CALIFORNIA COMMISSION ON TEACHER CREDENTIALING

CTC ONLINE HANDBOOK FOR ONLINE DOCUMENT SUBMISSION

CTC ONLINE OVERVIEW

APPROVED INSTITUTIONS AUTHORIZED AGENCIES

Published: October 4, 2012
Revised: May 13, 2016
Revised: May 14, 2019
Revised: July 20, 2026

Table of Contents

Introduction 1
Using This Handbook 2
Introduction to CTC Online 3
Technical Issues 4
Public Website Resources 7
Agency Users Resource – Credential Information Guide - Secured site 9
CTC Online Submission Process - Overview 11
CTC Online Users – Roles and Responsibilities 11
Agency User – Authorized Designees and Submitters 14
Agency User – Complete the Registration Process 14
Agency User – Login 19
Error Messages 19
Agency User – Forgot Your User ID? 22
Agency User – Forgot Your Password? 24
Agency User – My Account 29
Agency User – Logout of CTC Online 33
Agency User – Navigation Hints 34
Agency User – Welcome Back 42
Agency User – My Filtered Recommends 43
Agency User – My Recommends 44
Agency User – Organization Recommends (Authorized Designee) 45
Agency User – Educator Profile versus User ID and Password 46
Agency User – Start an Online Recommendation 46
Educator profile exists 47
Creating a new educator profile 48
Troubleshooting SSN, DOB & Name Issues 50
Agency User – Educator Detail 51
Approved Institution and Authorized Agencies links 53
Approved Institutions 53
Approved Institutions view 54
Approved Institutions - Resources 55
Approved Institutions – Create New Document 56
Approved Institutions – Add an Authorization 76
Approved Institutions – Upgrade A Document 83
Approved Institutions – Go to Edit Document 92
Authorized Agencies 97
Authorized Agencies view 98
Authorized Agencies - Resources 99
Authorized Agencies - Create New Document 100
Authorized Agencies – Go to Edit Document 105
Agency User – Employment Restrictions 109
Agency User – Attachments 117
Agency User – Application Summary 120
Agency User – Authorized Submitter Declaration 121

Agency User – Emails 122
Logout of CTC Online 122
Agency User – Corrections 123
Educator Profile Portal tab 124
Educator Profile – Educator Page 126
Educator Profile - *Document* Tab 127
Educator Profile - *Document Details* View 129
Educator Profile - *Application* tab 129
Educator Profile - *Adverse and Commissions Actions* tab 130
Closing the *Educator Profile* tab 130
Glossary of Terms 131

Introduction

This CTC Online Handbook may be found on the Commission's website under the "CTC Online Processing" link and the "Manuals & Handbooks" link. As information is changed or edited in this Handbook, it will be posted on our website.

Table of Changes

Update History

Date	Version
October 4, 2012	Published
May 13, 2016	First revision
August 21, 2018	Second revision
May 19, 2019	Third revision
July 29, 2026	Fourth revision

Changes

Section	Change
Entire document	5/13/2016 Removed obsolete information
Entire document	8/21/2018 Removed obsolete information
Entire document	5/09/2019 Removed obsolete information
Entire Document	7/29/2026 Updated links

Using This Handbook

This Handbook is designed to be used by individuals authorized by institutions or agencies with Commission-approved education programs and authorized agencies approved by the Commission to assist them in electronically submitting documents using the CTC Online system.

Credential Questions

If you have questions regarding **application status**, **credential requirements**, or **data input** errors, please contact the Commission's Division of Licensure Certification at Contact Us | Commission on Teacher Credentialing

Authorized Designee and Submitter Setup Questions

If you are experiencing **technical issues** while submitting applications, please contact the Commission via the email listed below. This email address is limited to **CTC Online password reset**, **CL-896 Authorized Designee and CL-897 Authorized Submitter add, change or remove requests**, and **technical issues**.

- Email: CTConline@ctc.ca.gov

Hints, Frequently Asked Questions, and tips for using CTC Online



The yellow triangle exclamation icon above will appear whenever a tip or frequently asked question is addressed within this handbook.



The red exclamation icon above will appear when there is important information or action item.



The green flag icon will appear when there is an action item.

The following CTC Online resources are available from the Commission's website:

- Credential Information Guide (password required)
  - CTC Online - Processing Recommendations
    - Checklists
    - Forms
    - Online Resources
    - FAQs
- CTC Online – Login Help | Commission (primarily for educators)
- CTC Online – Your Educator Account | Commission (for educators)
- Apply for a New Document | Commission (for educators)

Introduction to CTC Online

What is CTC Online?

CTC Online is an in-house Web based credential lookup, renewal, and submission process for Approved Institutions and Authorized Agencies.

The CTC Online system provides the public, educators and stakeholders availability to view credential data closer to real-time through a Web interface. Access to CTC Online is through the Commission's home web page.

Fees

The online application submission fees are defined in the Fee Schedule leaflet. There is a $2.50 processing fee charged by LexisNexis Payment Solutions. The fees are paid through our vendor LexisNexis. The LexisNexis Payment Solutions accepts, all major credit cards: MasterCard, Visa, American Express, and Discover.

The Commission does not have the ability to transfer the application and/or fee from the web or paper application over to the recommended document.

The Commission is a fee-supported agency. According to Title 5 §80487, fees are earned upon receipt.

Processing Timeframes

Applications with the status of "Pending Evaluation" are processed within the timeframes below. Applications displaying another status may take longer to process. Applications that are evaluated and returned for additional information may take up to an additional 50 business days to process from the date the Commission receives the returned application or requested materials.

Recommendations (Online Documents) submitted by:

- Institution of Higher Education and Commission approved programs:

  These online applications are generally processed within ten business days from the date the Commission receives the payment, application, and any supporting materials, whichever is later.

- Authorized Agencies:

  These online applications are generally processed within ten business days from the date the Commission receives the payment, application, and any supporting materials, whichever is later.

The Recommendation submission process is a two-part process. In general, the first part of the process is completed when a recommending authority creates and submits a document to the Educator. The second part of the process is when the Educator selects the recommended document and completes the associated application and fee.

If a document has been incorrectly submitted, go to the Agency User Views - Corrections section for additional information.

Renewals

These online applications are generally processed within ten business days from the date the Commission receives the payment and application.

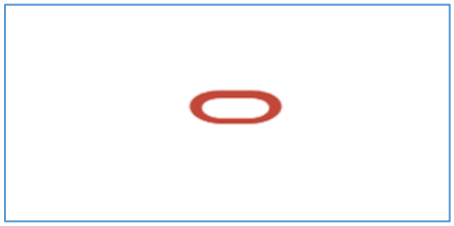
Technical Issues

The following error messages may display when initially using the CTC online process:

- **Red oval spins or page is inactive or fails to fully load**

  This may occur when:

  - multiple windows or browsers are open
  - their internet browser is outdated or not properly closing a session
  - their internet connection is slow
  - their computer settings are affecting the connection
  - their internet connection is restricted (like at a school)



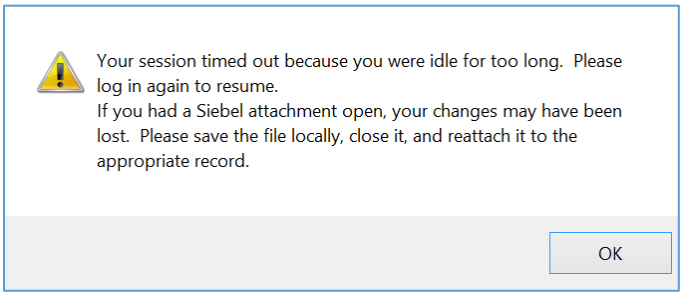
- **Session Timed Out message**

  The system will implement security measures and automatically close an open session after **20 (twenty)** minutes of inactivity. Inactivity occurs when the Authorized Submitter or Designee did not logout and the ***Next*** or ***Back*** button had not been used.

  Users who are unable log in after the system automatically closes a session must close the browser and re-open the browser. Selecting the browser's 'Refresh' icon will not resolve this issue.

Implement a routine to log out if not actively viewing or inputting application data. Do not leave a session open on an unattended computer.

A pop-up message will display when the system automatically closes an open session due to inactivity.



Bookmarking the CTC Online webpages

For enhanced security, any page that displays after the CTC Online Login page cannot be bookmarked.

Internet Browsers

The Commission strives to make the system compatible with the various internet browsers. If you experience difficulties with using the online system, it may be necessary to clear the browser history and/or try using a different internet browser. If you continue to experience difficulty using the online system, please submit a Contact Us Form

CTCOnline@ctc.ca.gov email address

The CTCOnline@ctc.ca.gov email address is for authorized designees and submitters only.

If you experience login, technical issues unrelated to the search or recommendation processes, or need to submit a CL-896 or CL-897 request for CTC Online access, please email CTConline@ctc.ca.gov and include one of the following topics in the subject line:

- User ID/Password Issue (do not include the Password in the email)
- CL-896 Authorized Designee Add or Remove
- CL-897 Authorized Submitter Add
- CL-897 Authorized Submitter Change Permissions
- CL-897 Authorized Submitter Remove
- Siebel Error Message

Please include the following within the body of the email:

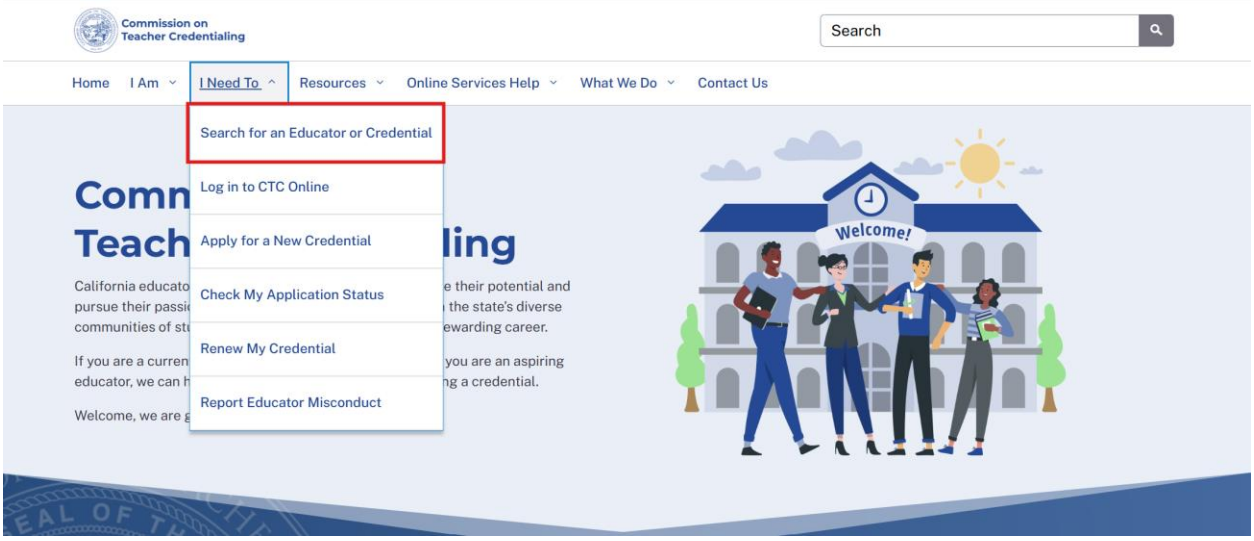
- Your name
- Your CTC Online User ID
- Agency or Approved Institution
- Phone number
- Screenshots of the issue or error message
- Your question or issue including a detailed description of what you are trying to find out, what you are trying to do, or what is happening, the educator's name and date of birth

Public Website Resources

Search for an Educator

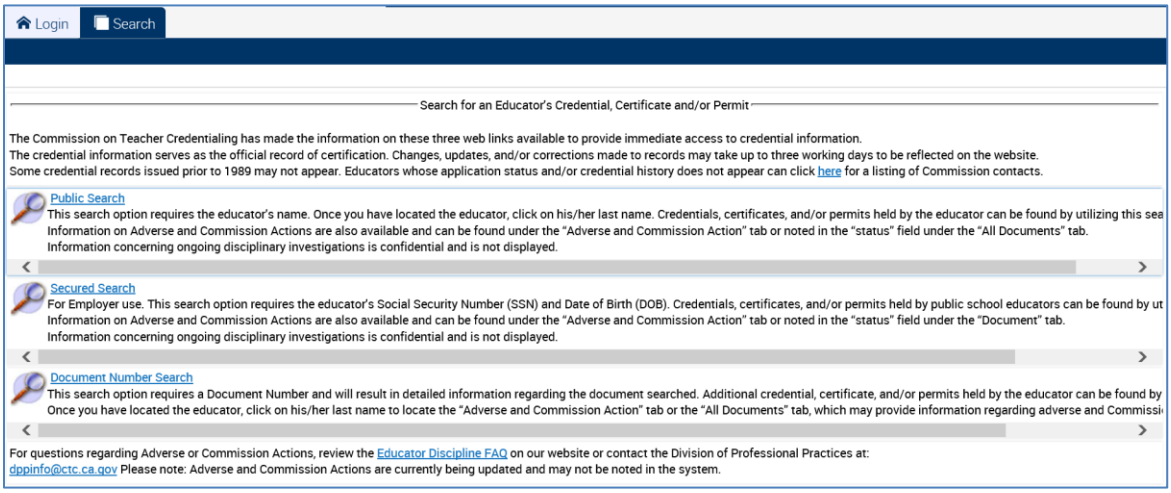
The Commission has provided through the **Search for an Educator** link immediate access to an educator's public credential information. The credential information viewed on the Commission's website serves as the official record of certification. Changes, updates, and/or corrections made to records may take up to three working days to be reflected on this website.

Click **"I Need To"** then **"Search for an Education or Credential"**.



Click either the icon or the blue hyperlink to begin a search.

- The tabs at the top (Login and Search) display on all search views.
- The **Login** tab goes to the **CTC Online Login** view *unless* the user is logged in as either an Educator, an Authorized Designee or an Authorized Submitter.



CTC Online Services Help | Commission
The following public webpages provide initial technical and troubleshooting help for an educator using the CTC Online system. However, some of the information provided on these pages can also assist an Agency User.

Login Help

The Login Help page provides information on the following topics:

- Error messages
- Page does not display or is inactive
- Log in with your User ID and Password
- Forgot Your User ID?
- Forgot Your Password?/Password has expired
- Register using the Create Educator Account link. This link is for:
    - Individuals who have never submitted an application.
    - Educators who have not logged in since February 2017.
    - Educators who have received the *Your Login is no longer valid* message.

Your Educator Account

The CTC Online – Your Educator Account page provides information on the following topics :

- Add or Change Your Information
- Add or Change Your Address
- Edit Your Challenge Questions and Answers
- Change Your Password - when you are logged into your account
- Check the Status: fingerprint clearance, application and documents, including additional application status information
- Documents: view, print and email.

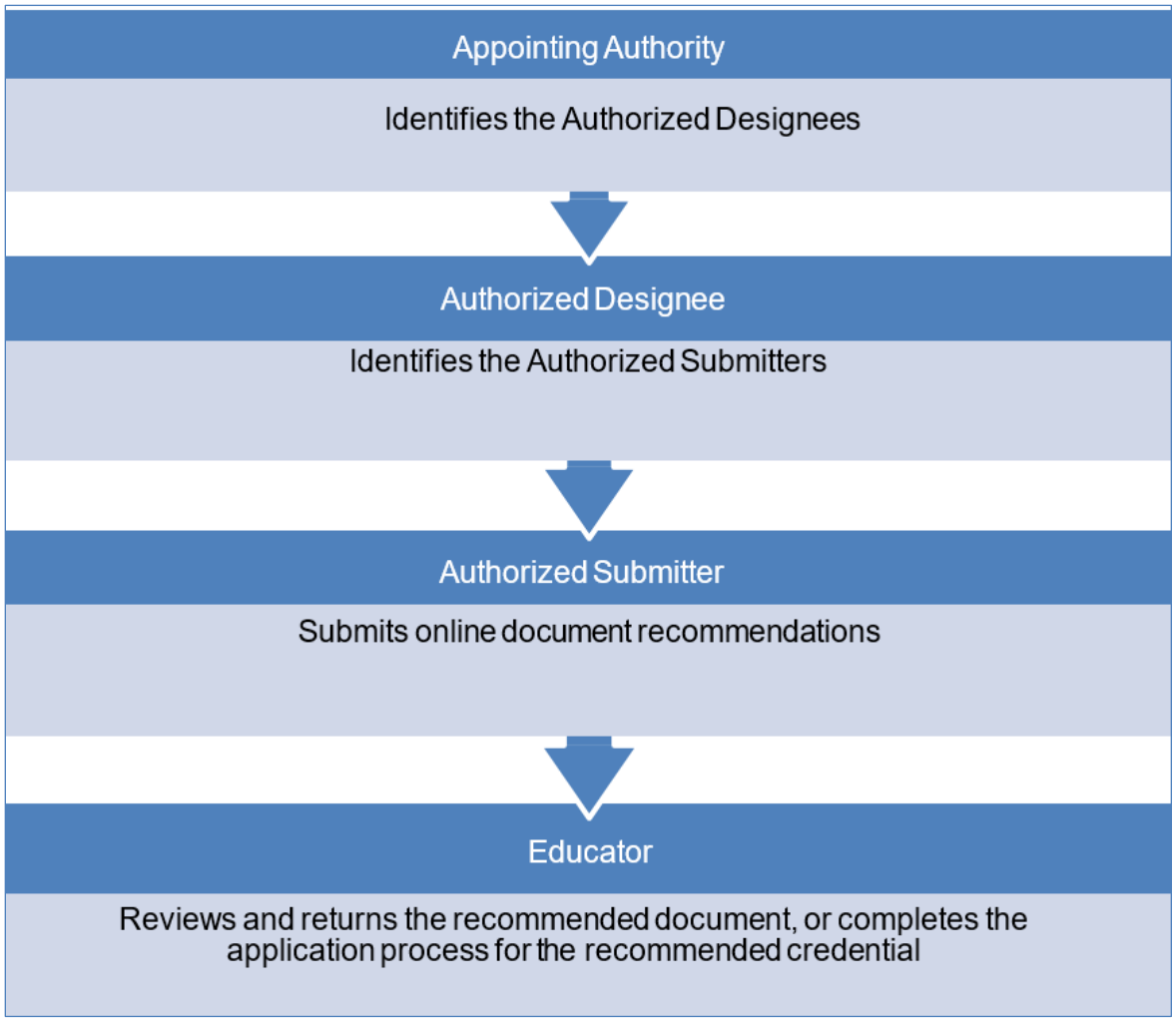
Written Instructions for Application and Payment

The CTC Online – Application and Payment Help | Commission page provides information on the following topics:

- Error messages
- Complete Your Program's Recommendation
- Return Your Program's Recommendation
- Renew Your Document - selecting a base credential
- Apply for Fingerprint Clearance (COC and ASCC)
- Complete a saved COC or ASCC application
- Professional Fitness Questions (PFQs)
- Payment

CTC Online Submission Process - Overview

The CTC Online Submission process is dependent on the following external users:



CTC Online Users – Roles and Responsibilities

This handbook focuses on the roles and responsibilities of four types of CTC Online Users: 1) Educator, 2) Appointing Authority, 3) Authorized Designee and 4) Authorized Submitter. Review the Roles and Responsibilities chart for detailed information on the specific roles, responsibilities and authorizations associated with each type. Below is a generic explanation of each type.

1) Educator

An Educator can create and access the educator **Educator Page** and create, save, return and/or complete and submit electronic applications and payments to the Commission.

Educators cannot correct or change their **Social Security Number, Date of Birth or Name** using the CTC Online system. The Education is required to complete Form 41-NC Request to Change Name or Personal Profile and mail it to the Commission. There is no fee for submitting this document.

2) Appointing Authority

An individual whose only role is an Appointing Authority does not have access to the CTC Online system. An Appointing Authority may request the additional role of an Authorized Designee and/or Authorized Submitter.

The Appointing Authority must:

- Be the Dean or Superintendent or their designee
- Identify Authorized Designees
- Maintain a list of Authorized Designees by adding, changing, or removing individuals as needed using the CL-896 Add or Change Authorized Designee form and emailing it to CTCOnline@ctc.ca.gov.

3) Authorized Designee

Authorized Designees do not submit documents using the CTC Online system. An Authorized Designee is responsible for maintaining a list of Authorized Submitters by adding, changing, or removing individuals as needed using the CL-897 Add or Change Authorized Submitter form and emailing it to CTCOnline@ctc.ca.gov.

An Authorized Designee may request the additional role of an Authorized Submitter. Once the Authorized Designee logs into the CTC Online system, the Authorized Designee can:

- Track the status of documents submitted either by an authorized submitter to the educator or an application the educator has submitted to the Commission electronically using the:
  - ✓ My Organization's Recommends view
  - ✓ My Filtered Recommends view (if the Designee also has the role of Submitter)
  - ✓ My Recommends view (if the Designee also has the role of Submitter)
- Query, export and/or print data displayed on the following views:
  - ✓ My Organization's Recommends
  - ✓ My Filtered Recommends view (if the Designee also has the role of Submitter)
  - ✓ My Recommends view (if the Designee also has the role of Submitter)

4) Authorized Submitter

Authorized Submitters must be employees of the Authorized Agency/ Approved Institution. Only Authorized Submitters may make online credential recommendations for Educators. This responsibility may not be delegated to another employee, through contract and/or MOU, or other individuals employed by other entities providing curriculum, management, or other services to the Commission-approved program sponsor.

When a change is required to your existing authorizations, your Authorized Designee must complete and email the completed CL-897 Add or Change Authorized Submitter form to CTConline@ctc.ca.gov.

Once the Authorized Submitter logs into the CTC Online system, they may have the authorization to do the following:

- **Create** a new Educator Profile entering limited educator information
- **Edit** an existing Educator Profile when creating a document for submission to the educator. For security purposes, an email notification will be sent when a name or email address change is made.
- **Create** a New Document
- **Add** an Authorization
- **Upgrade** a Document
- Track the status of documents submitted, either by an Authorized Submitter to the Educator or an application the Educator has submitted to the Commission:
  - ✓ My Organization's Recommends view
  - ✓ My Filtered Recommends view
  - ✓ My Recommends view
- Perform the following actions to documents listed on the *My Filtered Recommendations* view:
  - ✓ Save
  - ✓ Query
  - ✓ Select all
  - ✓ Delete
  - ✓ Submit
  - ✓ Open a document to view using the document title hyperlink

- Query, export and/or print data displayed on the following views:
  - ✓ My Filtered Recommends view
  - ✓ My Recommends view

Agency User – Authorized Designees and Submitters

The Appointing Authority (for Authorized Designees) or Authorized Designees (for Authorized Submitters) must email the Commission a completed CL-896 Add or Change Authorized Designee or CL-897 Add or Change Authorized Submitter authorizing access the CTC Online system as an Authorized Designee or Authorized Submitter.

When a **new** Authorized Designee and Submitter account is set up, the User ID and *temporary* Password are emailed directly to the new user from Commission staff. Review the Initial Login – Complete the Registration process for more information.

Review the CTC Online User List to confirm your role and authorizations.

When changes are needed to your authorizations, the Appointing Authority (for Authorized Designees) or the Authorized Designees (for Authorized Submitters) must email the Commission a new CL-896 Add or Change Authorized Designee or CL-897 Add or Change Authorized Submitter.

Agency User – Complete the Registration Process

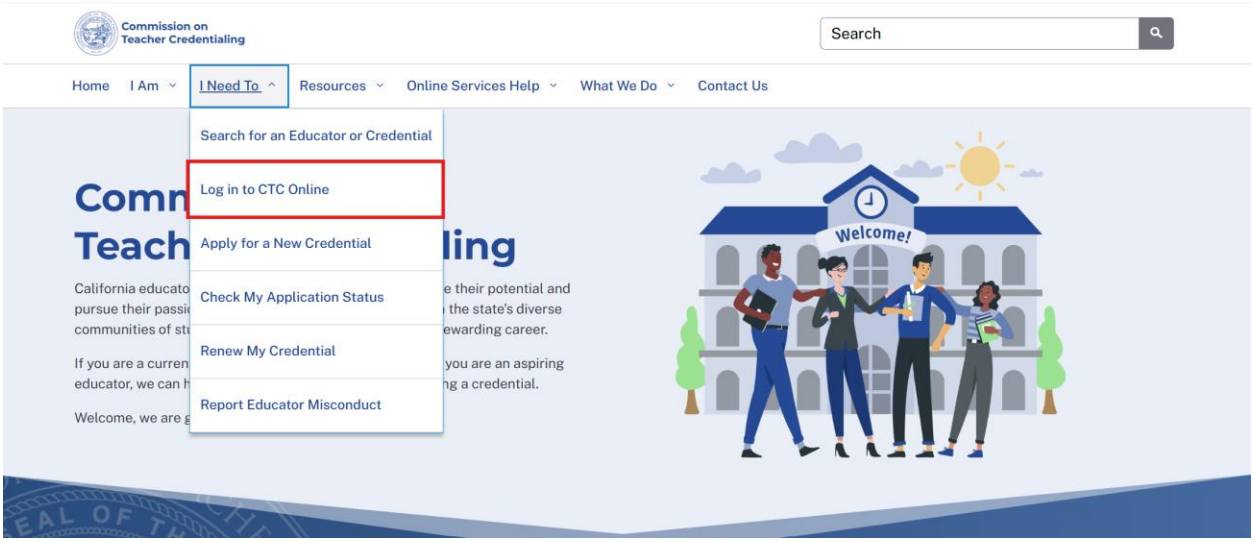
The steps to complete the Registration Process are:

- Receive an email from the Commission (CTCOnline@ctc.ca.gov) with your User ID and *temporary* Password.
- Go the Commission's website and click *Online Services for Agencies*
- Enter a valid **User ID**
- Enter the *temporary* **Password**
- Click ***Login***
- Change the *temporary* Password
- Create your Challenge Questions and Answers

Initial Login – Complete the registration process

New users can complete the registration process when an email from CTCOnline@ctc.ca.gov has been received.

- Go to the Commission's website (www.ctc.ca.gov).
- Click ***Online Services for Agencies***.

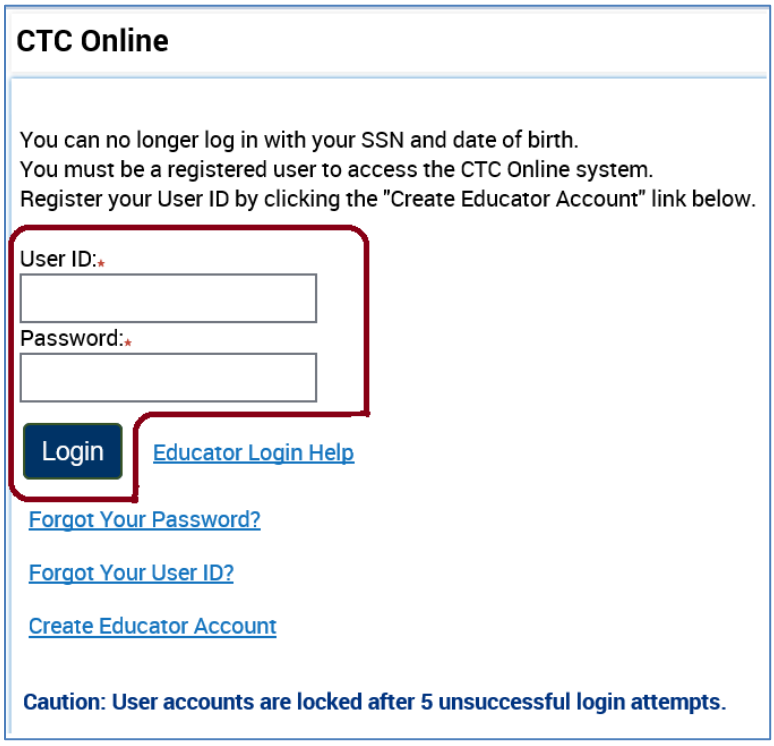


CTC Online Login view

- Enter your **User ID.**
- Enter your ***temporary*** **Password.**
- Click ***Login.***

DO NOT use the ***Create Educator Account*** link.

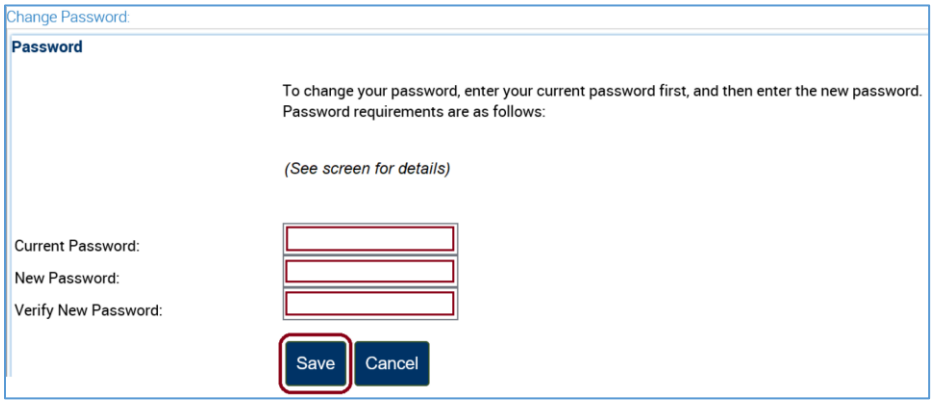
This link is for the Educator's only.



The **first time** you Login with your **User ID** and *temporary* **Password**, the system will prompt you to change your Password and create your Challenge Questions and Answers.

The **new** Password is accepted when the *Challenge Questions and Answers* view displays.

Do not share your User ID and Password with others.



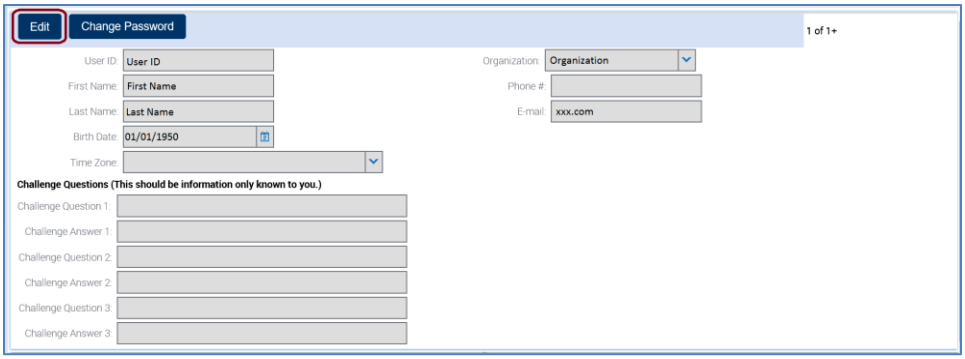
***Challenge Questions and Answers* view**

This is part of the initial account setup. It is crucial that Authorized Designees and Authorized Submitters successfully create three Challenge Questions and Answers which will be used for authentication purposes when the ***Forgot Your User ID?*** or ***Forgot Your Password?*** link is used.

The *Edit / Change Password* view is used to create and later update your Password and Challenge Questions and Answers.

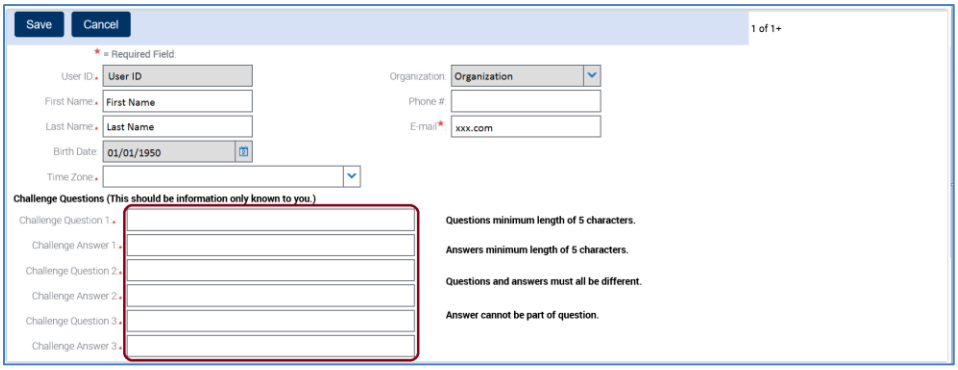
Email CTCOnline@ctc.ca.gov if the Authorized Designee or Submitter's Birthdate or Organization information is incorrect.

Click ***Edit*** to open the fields.



Click in each field to enter your Challenge questions and answers.

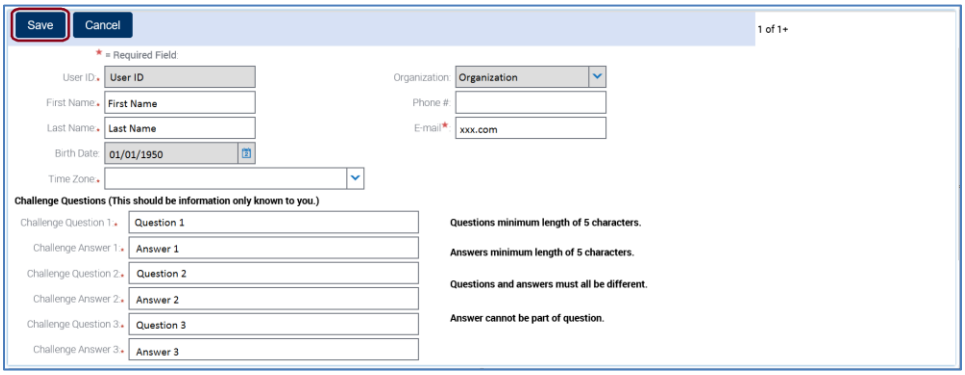
You can also update your First and Last Name, Phone number and email address.



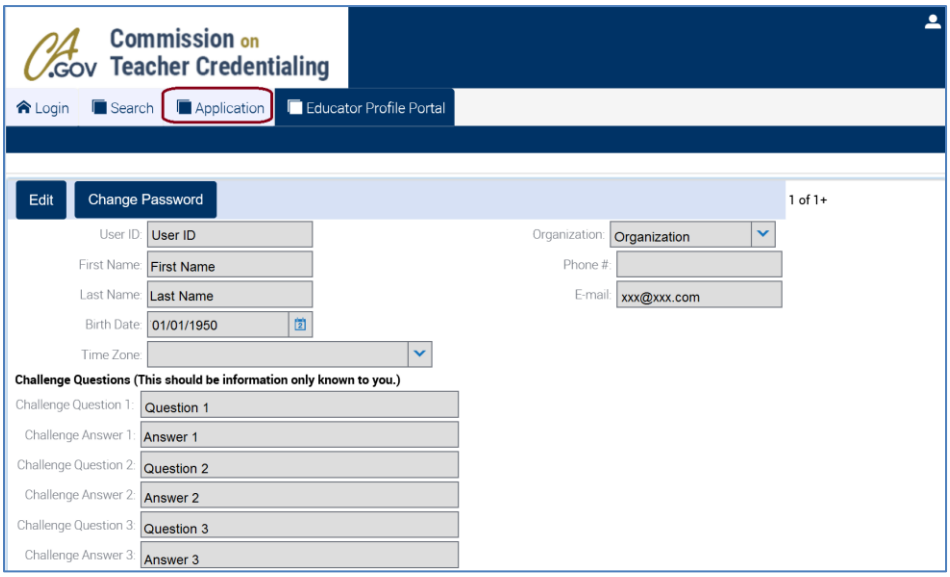
Click ***Save***.

If an error message displays, please check your questions and/or answers and change them as needed to meet the system requirements.

The challenge questions and answers meet the system requirements when the *Edit / Change Password* view displays with your challenge questions and answers.



Click the *Application* tab at the top of the page to close the *Edit / Change Password* view and access the *My Filtered Recommends* view.

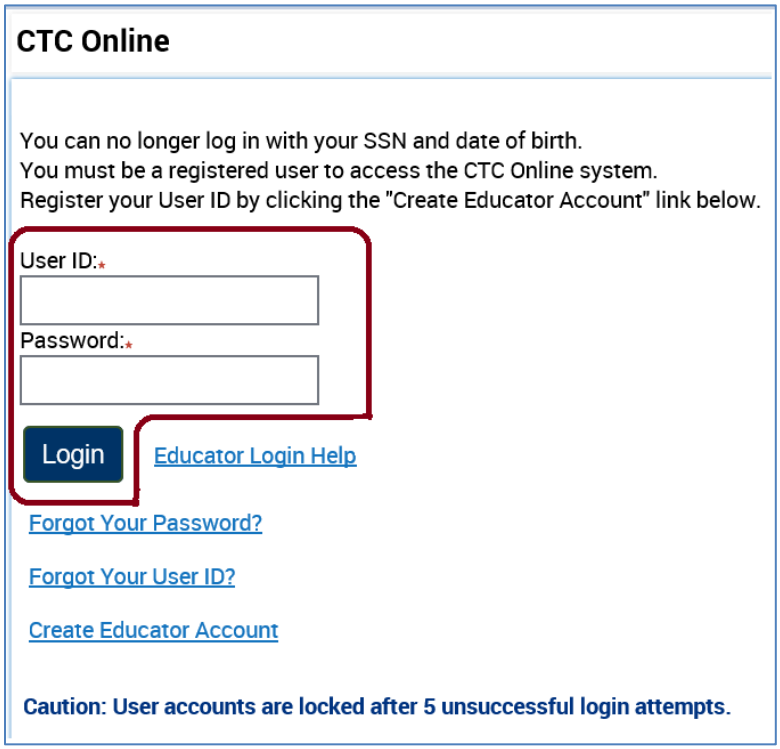


Agency User – Login

CTC Online Login view

- Enter a valid **User ID.**
- Enter the current **Password.**
- Click ***Login*.**

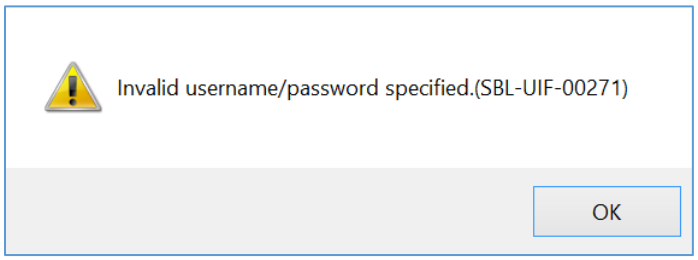
When the **User ID** and **Password** entered are accepted, the *Welcome Back* view displays.



Error Messages

- **Invalid Username/Password specified – error message (SBL-UIF-00271)**

  This message will display when the User ID and Password entered do not match our records or the account has been locked after 5 unsuccessful attempts.



The initial lockout period is **30 minutes**. Each login attempt made during the initial 30-minute lockout period will extend the lockout time.

While the account is locked, the system will allow a temporary password to be sent and for the password on the account to be reset. However, resetting a password will not unlock the account. The same error message will display when logging in with the new password. As a result, an account can quickly become locked for hours.

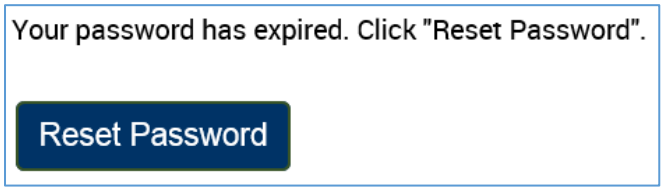
Commission staff cannot unlock an account.

When an account is locked, waiting 24-hours before attempting to log in again ensures the account is unlocked and aligns with the expiration of an emailed temporary password.

- **Your Password has expired – message**

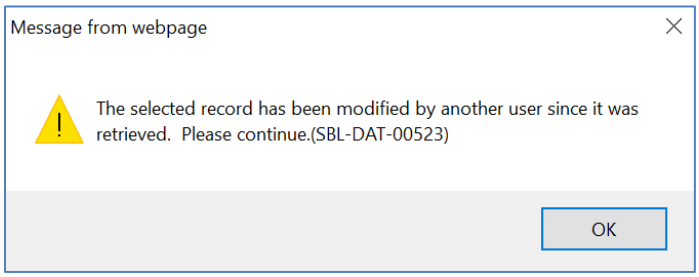
  After logging in with a valid User ID and *expired* Password, a message to reset your password will display. The same process is used when resetting an *expired* password or using ***Forgot Your Password?***.

  Click ***Reset Password***



- **The selected record has been modified by another user - error message (SBL-DAT-00523)**

  This message may display at any time when using the CTC Online system. The "user" is the authorized submitter or designee. **This message will not lock the account.** It can display more than 5 times and again later on in the process. View the Login Help webpage for additional guidance.

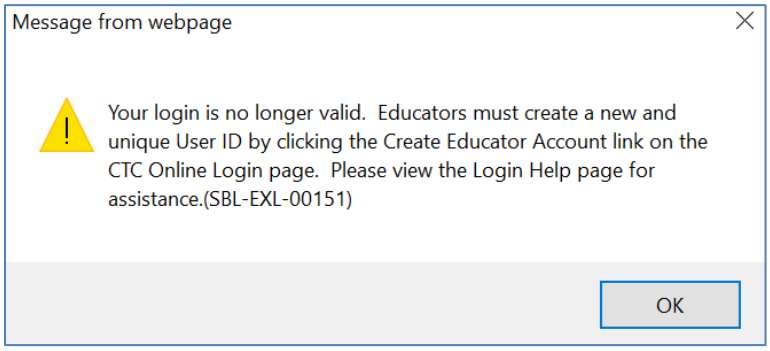


- **Your login is no longer valid - message (SBL-EXL-00151)**

  This message will display when the User ID has been invalidated by the Commission.

  DO NOT use the ***Create Educator Account*** link.

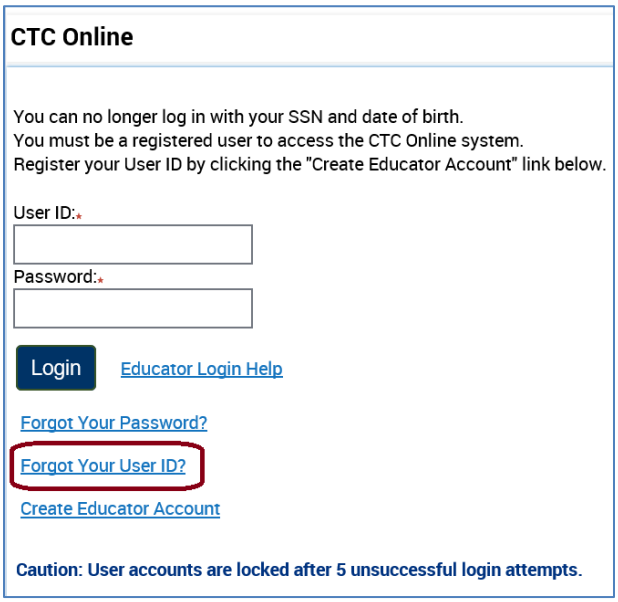
  - Email CTCOnline@ctc.ca.gov if you receive this message and you believe it is in error.



Agency User – Forgot Your User ID?

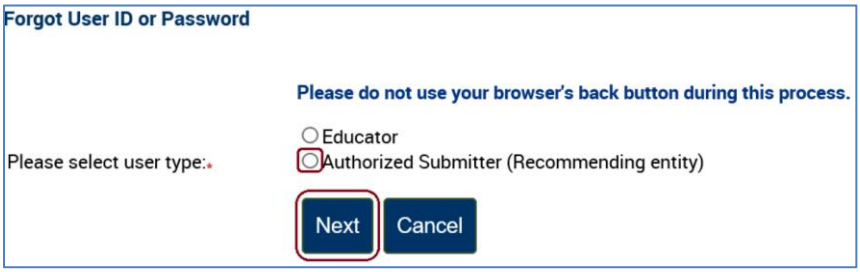
CTC Online Login view

- Click ***Forgot Your User ID?***



Forgot User ID or Password view

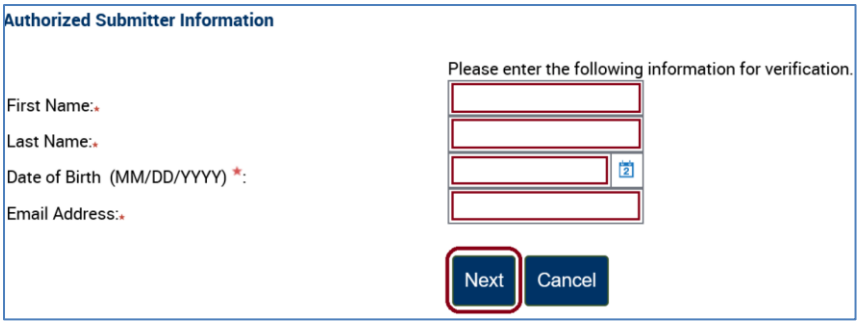
- Click ***Authorized Submitter (Recommending entity)***.
- Click ***Next***.



Authorized Submitter Information view

All answers must match our records exactly.

- Enter your **First and Last Name.**
- Enter your **Date of Birth** (leading zeros will be removed when ***Next*** is clicked).
- Enter the **email address** associated with your account.
- Click ***Next***.

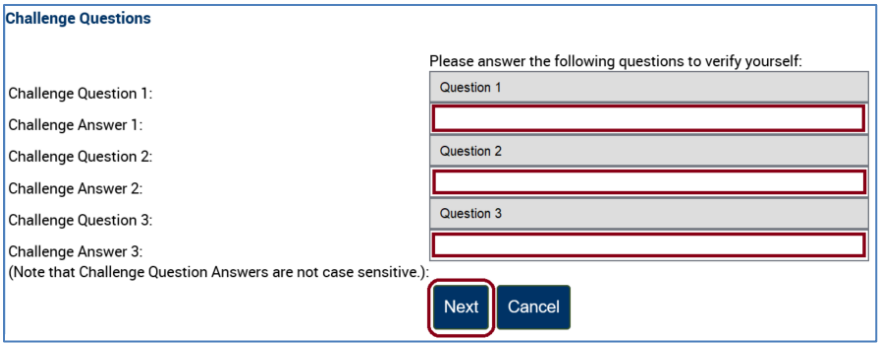


Challenge Questions & Answers view

The challenge questions will display in locked fields.

All answers must match the Commission's record exactly.

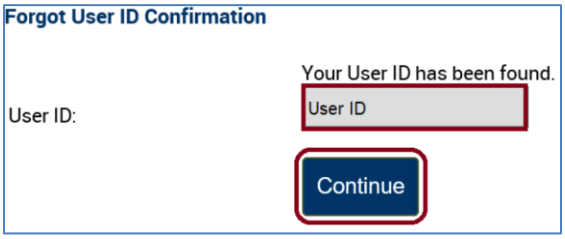
- Click in each answer field and enter the answer on file for all three questions.
- Click ***Next.***



Forgot User ID Confirmation view

When all of the entered information matches our records, the *Forgot User ID Confirmation* view will display.

- Click ***Continue*** to return to the *CTC Online Login* view.



Error messages

The following error messages may display when using **Forgot Your User ID?**

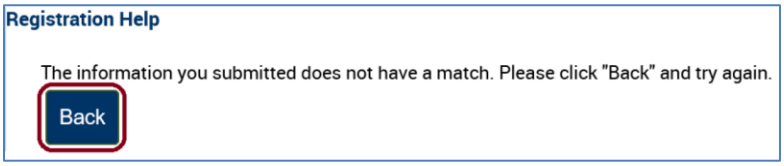
- **Registration Help - The information you submitted does not have a match**

  This message will display when:

  - **Educator** was selected instead of **Authorized Submitter**.
  - The information provided does not match the Commission's record *exactly*.

  Email CTCOnline@ctc.ca.gov for troubleshooting assistance when the **Authorized Submitter** option was selected and you receive this error message.

  Click ***Back*** to return to the *Challenge Questions & Answers* view



- **Challenge Question Error**

  Triggers when the answers provided to the challenge questions do not match our records exactly. If you forgot your Challenge Question answers, please email CTCOnline@ctc.ca.gov to reset your password.

  Click ***Back*** to return to the *Challenge Questions & Answers* view

  OR

  Click ***Exit*** to return to the *CTC Online Login* view.

Agency User – Forgot Your Password?

The ***Forgot Your Password?*** can be used at any time to reset your password.

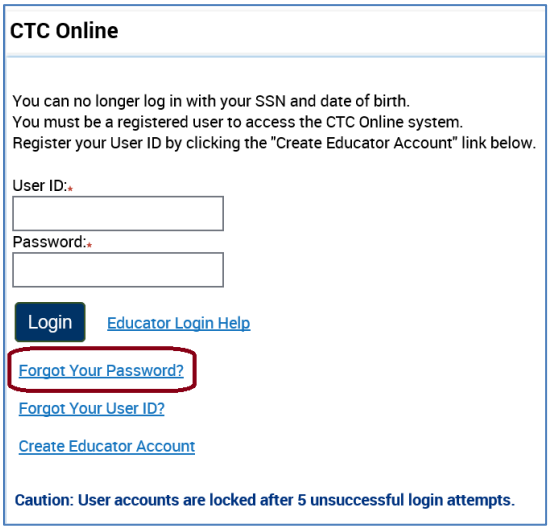
The steps for using **Forgot Your Password?** are:

- Click ***Forgot Your Password?***
- Click ***Authorized Submitter (Recommending entity)***
- Enter your First and Last name, Date of Birth and work email address
- Enter the answers to your Challenge Questions
  - If successful, reset the password
  - If unsuccessful, enter your work email address
  - If you are still unsuccessful, email CTCOnline@ctc.ca.gov

- Enter your new password twice
- Click ***Save***

CTC Online Login view

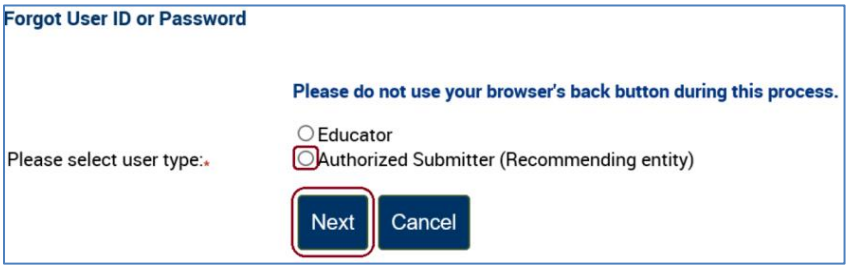
Click ***Forgot Your Password?***



Forgot User ID or Password view

Click ***Authorized Submitter (Recommending entity)***.

Click ***Next.***



Authorized Submitter Information view

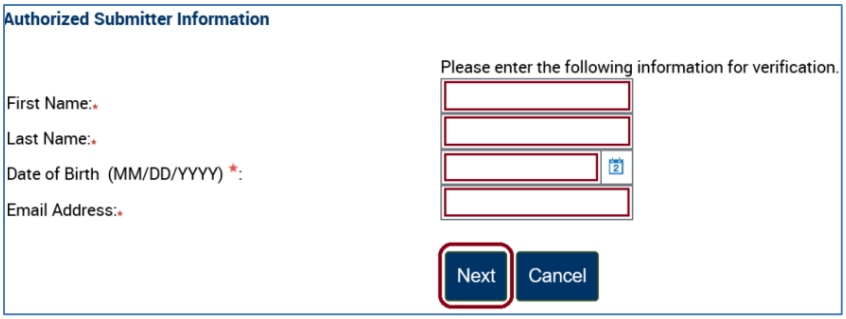
All answers must match our records **exactly**.

Enter your **First and Last Name.**

Enter your **Date of Birth** (leading zeros will be removed when ***Next*** is clicked).

Enter the **Email Address** associated with your account.

Click ***Next.***

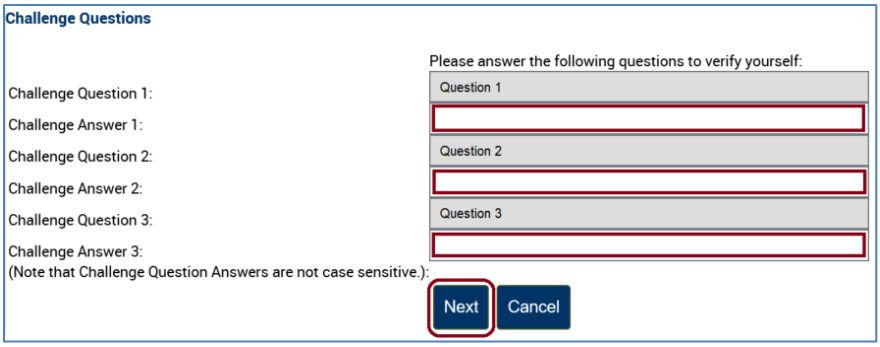


Challenge Questions view

The challenge questions will display in locked fields.

All answers must match the Commission's record exactly.

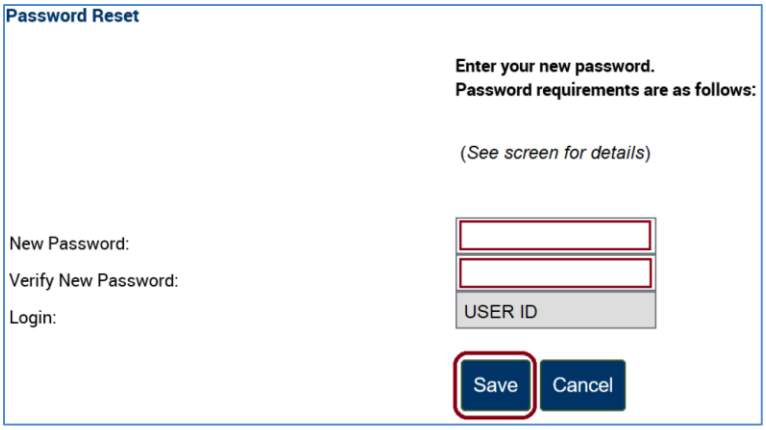
- Click in each answer field and enter the answer on file for all three questions.
- Click ***Next.***



The *Password Reset* view will display when the answers are correct.

- Enter your **New** Password in the ***New Password*** field.
- Enter your **New** Password in the ***Verify New Password*** field.
- Click ***Save.***

  When the new password has been successfully changed, the *Welcome Back* view will display.



Password has been updated email

An email will be sent to the email address on file when the new password has been accepted.

- If you did not request to reset the password, email CTCOnline@ctc.ca.gov.

Error messages

The following error messages may display when using **Forgot Your Password?**

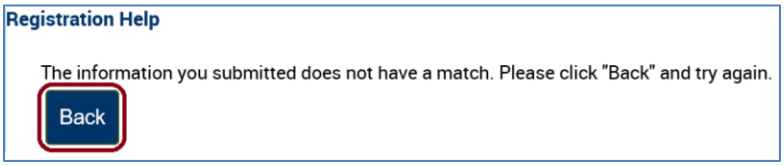
- **Registration Help - The information you submitted does not have a match**

  This message will display when:

  - **Educator** was selected instead of **Authorized Submitter**.
  - The information provided on the *Authorized Submitter Information* view does not match the Commission's records *exactly*.

  Email CTCOnline@ctc.ca.gov for troubleshooting assistance when the **Authorized Submitter** option was selected and you receive this error message.

  Click ***Back*** to return to the *Challenge Questions & Answers* view



- **Challenge Question Error**

  Triggers when the answers provided to the challenge questions do not match our records exactly. If you forgot your Challenge Question answers, please email CTCOnline@ctc.ca.gov to reset your password.

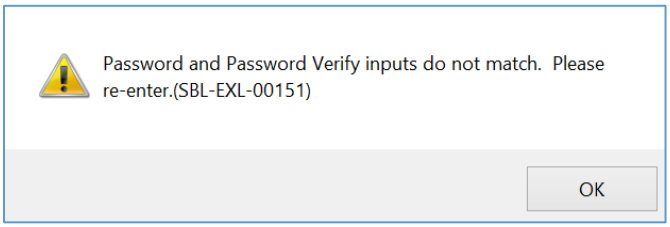
Click ***Back*** to return to the *Challenge Questions & Answers* view

OR

Click ***Exit*** to return to the *CTC Online Login* view.

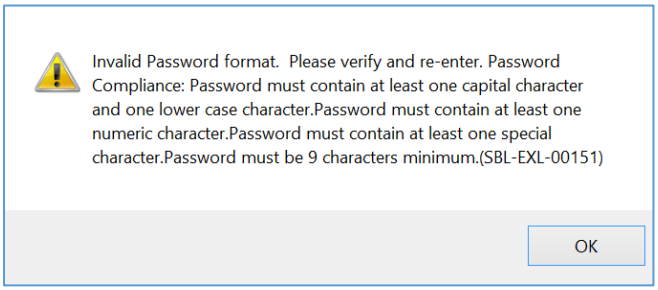
- **Both Passwords must match error message (SBL-EXL-00151)**

  The error message below will display even when the Password does not meet the format requirements.



- **Invalid Password format error message (SBL-EXL-00151)**

  When both Passwords entered match and it does not meet the format requirements, an invalid password format error message will display.



Agency User – My Account

My Account link

The *My Account* link is used to access your account information.

- Click the ***Person*** icon.
- Click ***My Account*** to access the *Edit/Change Password* view.



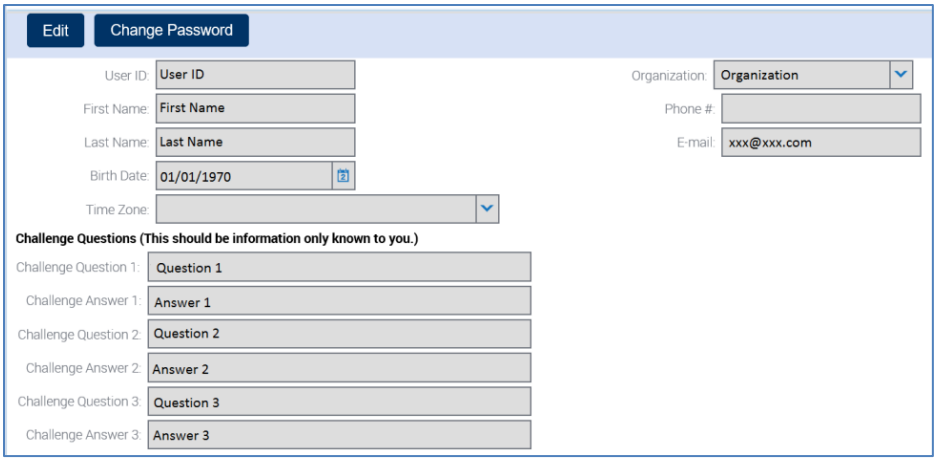
Edit / Change Password view

The *Edit/Change Password* view is used to:

- Edit your First and Last Name
- Edit your telephone number
- Edit your E-mail address
- Edit your Challenge Questions and/or Answers
- Change your Password
- Logout of the CTC Online system

There are two options on the ***Edit / Change Password*** view.

- Click **Edit** to immediately update the following information:
  - First and Last Name
  - Telephone number
  - E-mail address
  - Challenge Questions and/or Answers
- Click **Change the Password** to immediately change the password.



***My Account – Change Password – Password Reset* view**

The new password is changed instantly and will be required at the next Login.

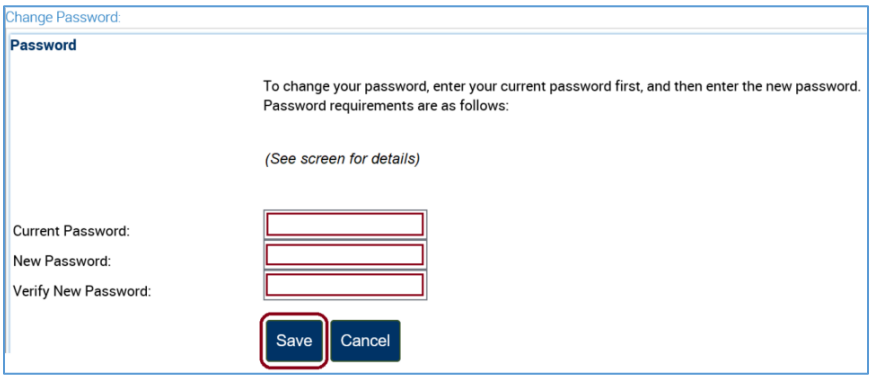
Change your Password

- Click ***Change Password.***

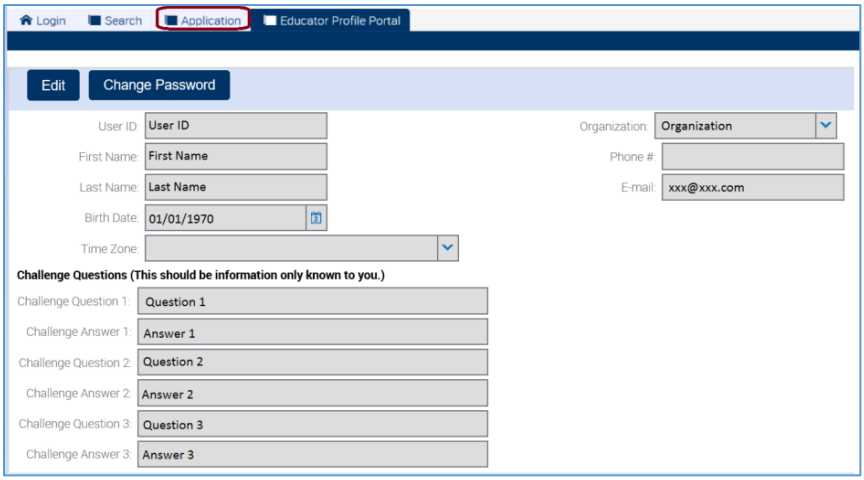


Change Password view

- Enter your **Current** Password in the ***Current Password*** field.
- Enter the **New** Password in the ***New Password*** field.
- Enter the **New** Password in the ***Verify New Password*** field.
- Click ***Save.***



When the Password has been successfully changed, click the *Application* tab to close this view and go to the *My Filtered Recommends* view.

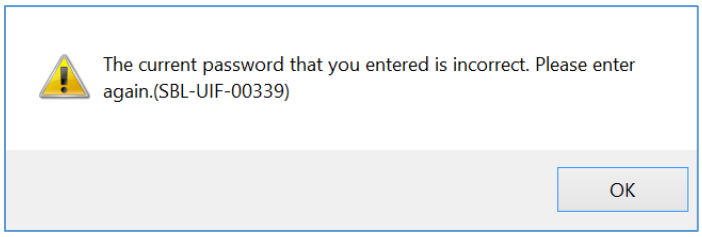


Password Error Messages

When a password does not meet the system requirements, an error message will display.

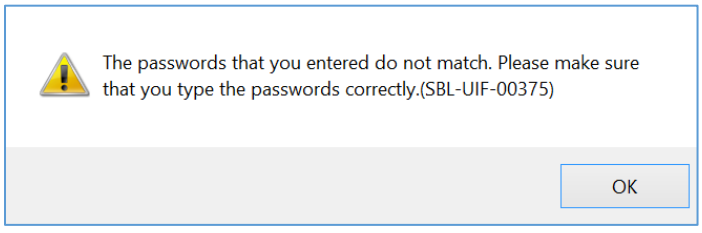
- **Password is incorrect (SBL-UIF-00339)**

  The error message will display when the current password does not match the password used to login.



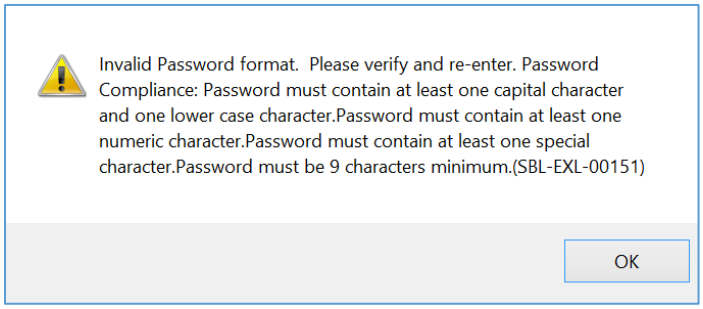
- **Passwords do not match (SBL-UIF-00375)**

  The error message below will display when the passwords do not match even if the new Password does not meet the format requirements.



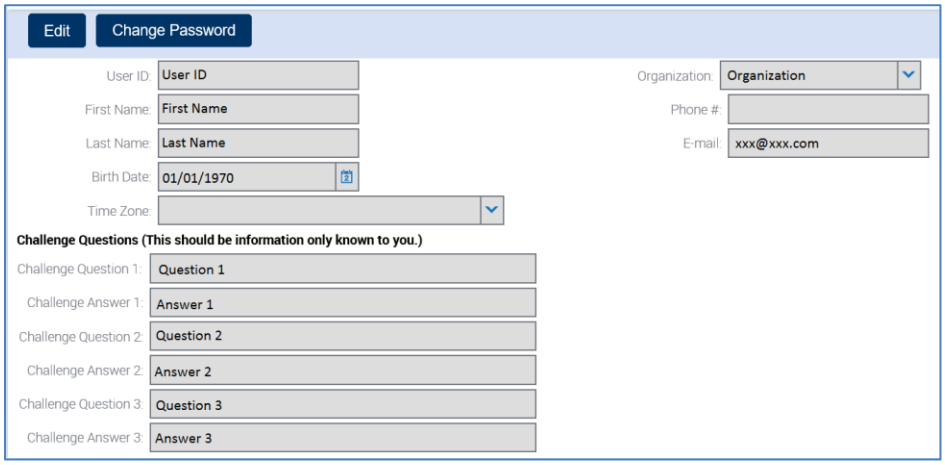
- **Invalid Password format error message (SBL-EXL-00151)**

  When both Passwords entered match and it does not meet the format requirements, an invalid password format error message will display.



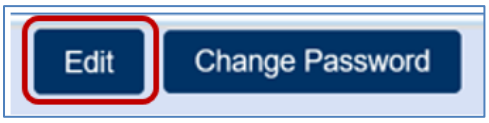
***My Account – Edit Challenge Questions and Answers* view**

Changed information is updated instantly and will be required when the ***Forgot my User ID?*** or ***Forgot my Password?*** links are used.



Edit your Challenge Questions & Answers

Click ***Edit.***



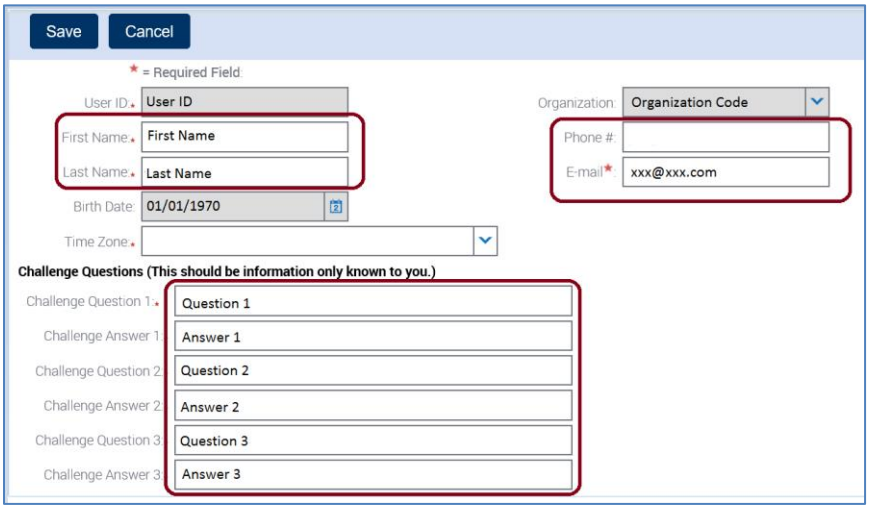
Click in the field(s) to delete and enter the new information.

The current text must be deleted before typing the new information.

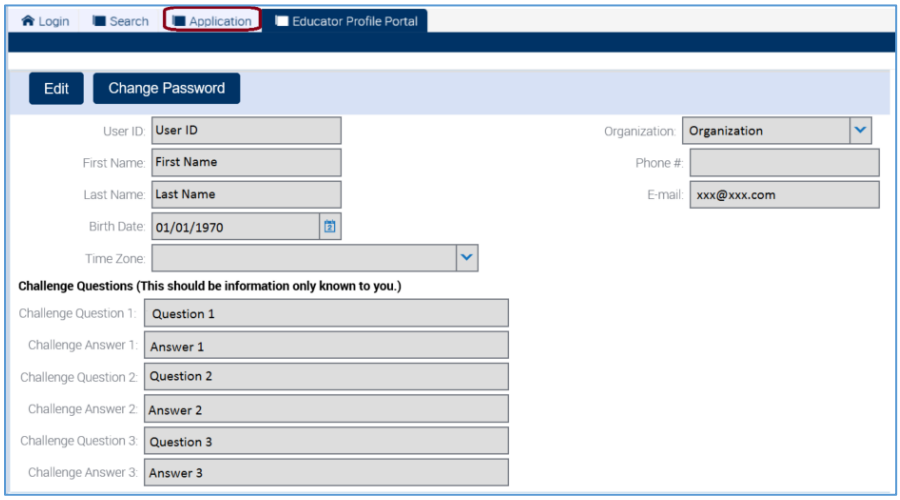
Text in locked fields cannot be changed using the CTC Online system.

Email CTCOnline@ctc.ca.gov if the information in a locked field is incorrect.

Click ***Save.***



When your personal information or challenge questions & answers have been changed, click the *Application* tab to close this view and go to the ***My Filtered Recommends*** view.



Agency User – Logout of CTC Online

When an Authorized Submitter or Designee has logged in, the **Person Icon** is displayed in the upper right corner. The Authorized Submitter or Designee can securely log out of their account using the ***Person*** icon.

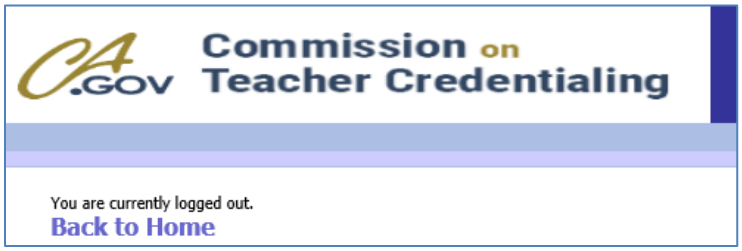
***Logout* link**

Click the **Person** icon at the top right corner of the page.

Click **Logout** from the pop-up window to securely exit the CTC Online system.



Click **Back to Home** or close the *CTC Online* tab.



Agency User – Navigation Hints

Below is a brief introduction to the navigation buttons, icons and pop-up windows used throughout the CTC Online system.

Buttons

The following buttons are located throughout the system. It is critical to understand each button may perform different functions depending on its location.

New and *Edit*

When these two buttons are displayed together:

- The ***New*** button will open the fields to enter information in empty fields.
- The ***Edit*** button when active will open the fields to delete or change existing information.



New and *Delete*

When these two buttons are displayed together:

- The ***New*** button will open the fields to enter information in empty fields.
- The ***Delete*** button will discard newly entered information, close the fields and display the previous data, if any.



Save, *OK* and *Cancel*

Always select the ***Save*** button whenever it is available to avoid losing information.

When the ***Save*** and ***Cancel*** buttons are displayed together:

- The ***Save*** button will save the entered information
- The ***Cancel*** button will discard any newly entered information and close the fields



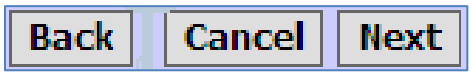
The ***OK*** and ***Cancel*** buttons are located together at the bottom of the pop-up window.

- The ***OK*** button will populate the fields with the selected information.
- The ***Cancel*** button will close the fields without populating the fields with any new information.



Back versus *Cancel* versus *Delete*

These three buttons appear together at the bottom of most views.



Back

The ***Back*** button performs different functions.

Back may return to the previous view or may it may delete and purge a document that has not yet been submitted to the Commission by the educator and change the status to "**Application to be deleted and purged**."

If the document was previously submitted, it will be removed from the *Educator Page*. It will also remove the document from the *My Filtered Recommends* view and display it only on the *My Recommends* and *Organizations Recommends* views. If the document is deleted, the entire document must be re-entered.

Cancel

The ***Cancel*** button performs different functions.

The ***Cancel*** button will delete and purge a document that has not yet been submitted to the Commission by the educator. ***Cancel*** may undo a previous action or ***Cancel*** may delete the entire document and change the status to "**Application to be deleted and purged**." If previously submitted it will be removed from the *Educator Page*. It will also remove the document from the *My Filtered Recommends* view and display it only on the *My Recommends* and *Organizations Recommends* views. If the document is deleted, the entire document must be re-entered.

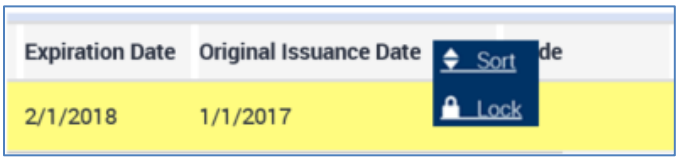
Next

The ***Next*** button advances through the views.

Arrows

Sort and *Lock* icons

- Click on a column heading to view the sort/lock icons. The Lock item locks the view. To unlock it, select it again.



- Click on the update/down arrows to sort the information in ascending or descending order.



Left/Right Arrows

These arrows display the next/previous set of records.

Example: 1-10 of 10+ indicate that 10 rows of information (documents) are displayed on this view and additional information is available.

Click the right arrow to display the next 10 rows.

Click the left arrow to display the previous 10 rows.



Greyed Out Arrows

This will display to the upper far right of a pop-up box or view when there is no match to the entered information. The bottom portion of the pop-up box will be empty.



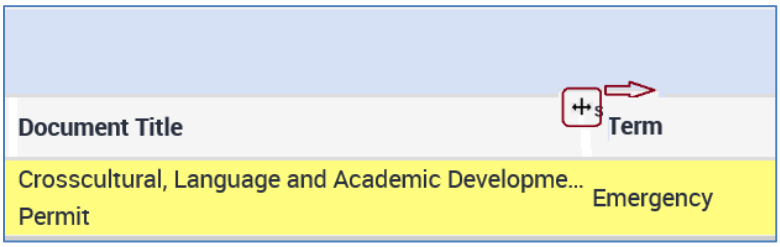
Resize column widths

Use the mouse pointer to resize column widths.

Place the mouse pointer **between any two column headings**. The mouse pointer will change into a double arrow cursor.

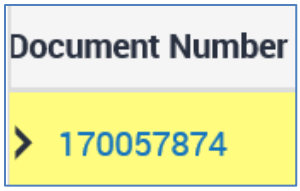
- Do not click on the heading column as the **sort/lock** option will display.

Click the mouse and drag the double arrow cursor to the left or right until the column width has changed and the information is viewable.



Select and view a document's details

Click on the document number to open the document and view all of the document details including all authorizations, renewal requirements and any employment restrictions.

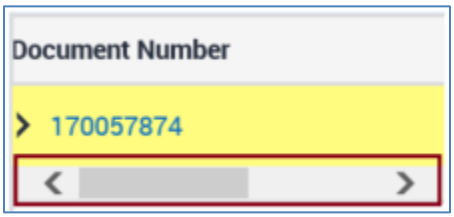


- **Print a document**
  - From the *Document Detail* view, you can print an unofficial copy of the document.
  - You can also use the Document Number Search option to print an unofficial copy of the document displaying all of the authorizations.
  - Adjust the column widths and/or sort the rows of information if needed.

The scroll bar

Use the scroll bar to view additional information not displaying on the screen.

- Click the left or right arrows or drag the bar left or right at the bottom of each section to view additional information not displaying on the screen.



Calendar icon

The calendar icon is displayed to the right of a data field. When selected, it will activate a pop-up window. The pop-up window will display the current Month and Year.



Entering Dates

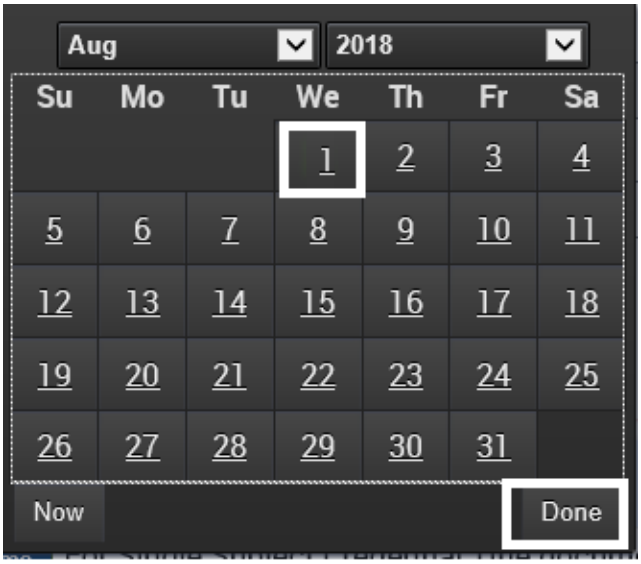
There are two options available for entering a date. The field will populate with either the entered or selected date.

- Enter the date with the (MM/DD/YYYY) format to populate the field

OR

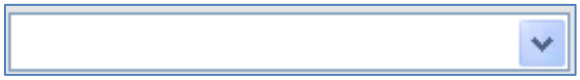
- Click the ***Date*** field calendar icon
  - The Calendar pop-up window displays the current Month and Year.
- Click the drop down arrow in the ***Month*** and ***Year*** fields to navigate to the correct month and year.

- Click on the correct date to highlight it.
- Click the ***Done*** button at the bottom right of the pop-up window to populate the field with the selected information.



Drop down arrow

The drop down arrow is displayed to the right of a data field. When selected, it will display information in a single column. Scroll down the list and select the item to highlight it. The selected information will automatically populate in the data field.



Pick applet

The pick applet icon is displayed to the right of a data field. When selected, it will activate a pop-up window. The pop-up window will display information appropriate for the data field.



Pop-up Windows

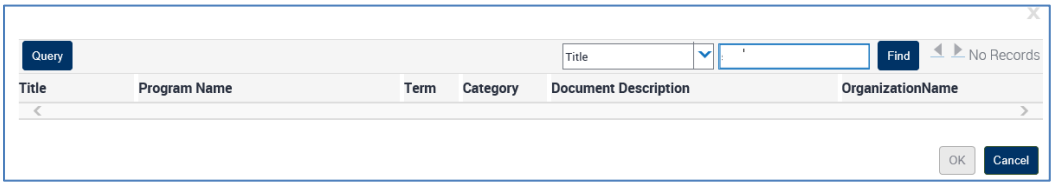
The pop-up window will display information appropriate for the data field.

- Expand pop-up window
  Expand the pop-up window by selecting the maximize window button located in the upper far right of the pop-up window.



- Close pop-up window
  Close the pop-up window by selecting the exit window button located in the upper far right of the pop-up window or click the ***Cancel*** button at the bottom right of the ***OK*** button.

- Blank pop-up window
  When a blank pop-up window appears, please check the following:
  - The information entered is not an exact match to the available data. **The information in the data field is case sensitive.**
  - Review the Organization Professional Preparation Program List. If the program is listed under your Organization, then it is possible that your User ID may not be linked. Check with your Organization's Authorized Designee to confirm you have been authorized to submit the recommendation. If you have been authorized, please email CTCOnline@ctc.ca.gov describing the problem and identify which Programs and/or Authorization Codes are needed.

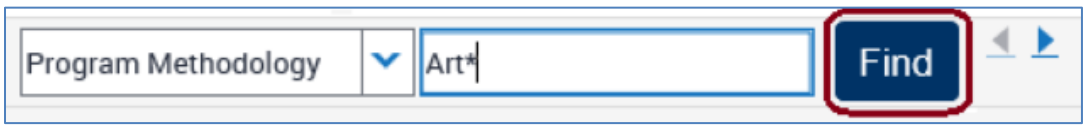


Find button

The ***Find*** button on a pop-up window will limit the information displayed in the pop-up window. For example:

- Click in the first data field and select a different column name, e.g. **Program Methodology.**
- Enter the Subject, e.g. **Art*** in the second data field.

  The information in this field is case sensitive.
- Click ***Find***.
  - If there is only one exact match, the information will automatically populate the field.
  - If there is more than one match or there is not an exact match, a pop-up window will display again.

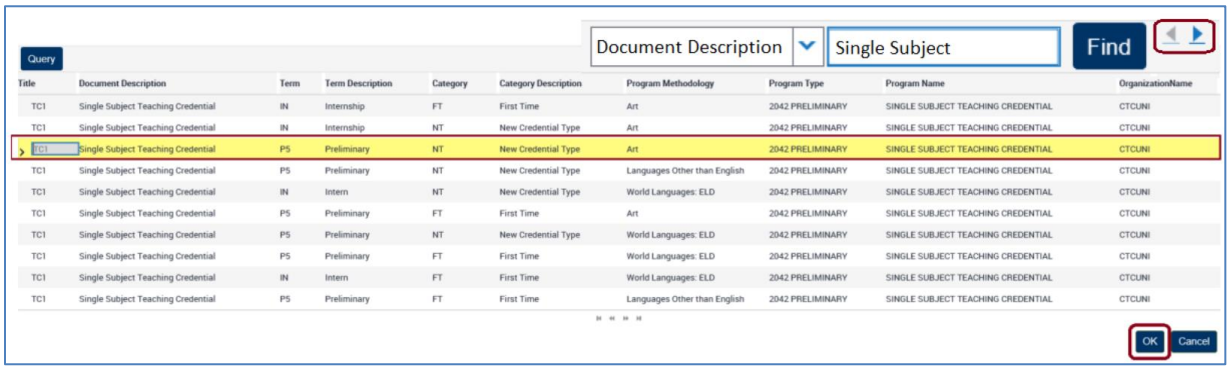


Select data displayed in pop-up window

Click on the row with the correct appropriate information to populate the field.

- When appropriate information does not appear within the first window, use the left/right arrows or the *Find* button.

Click ***OK*** to populate the fields with the selected information.

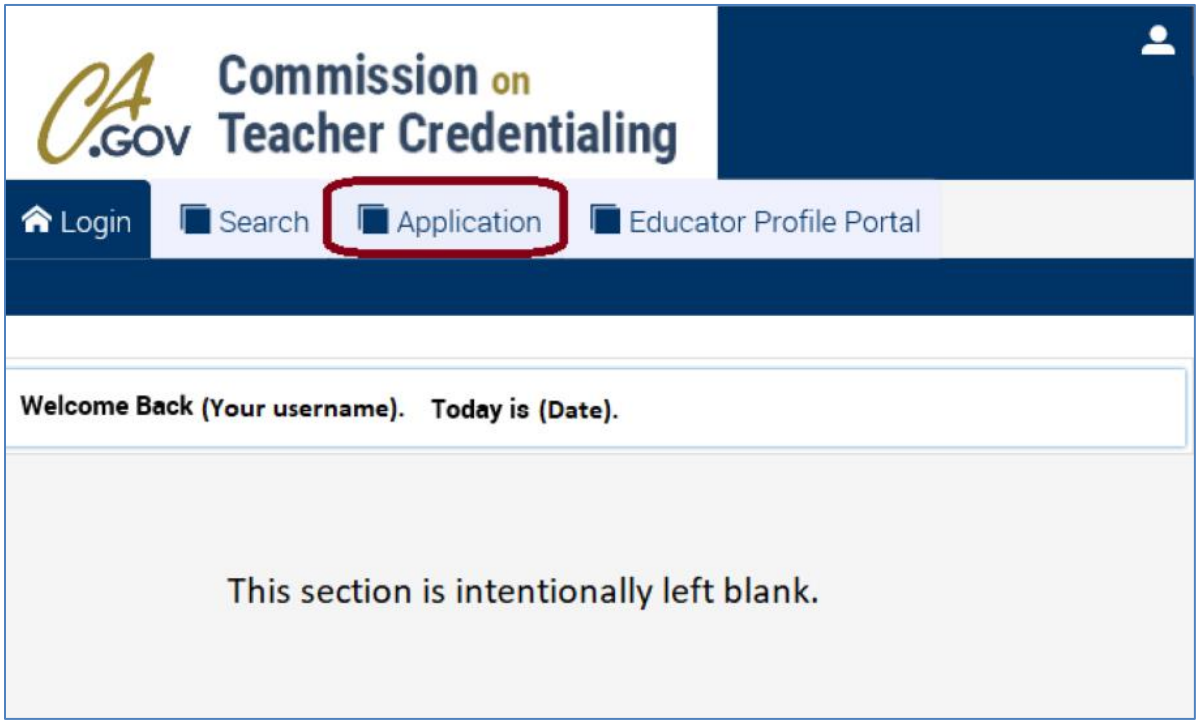


Agency User – Welcome Back

The *Welcome Back* view will display when you have successfully logged into the system.

The *Application* tab only appears when your account has been configured and linked.

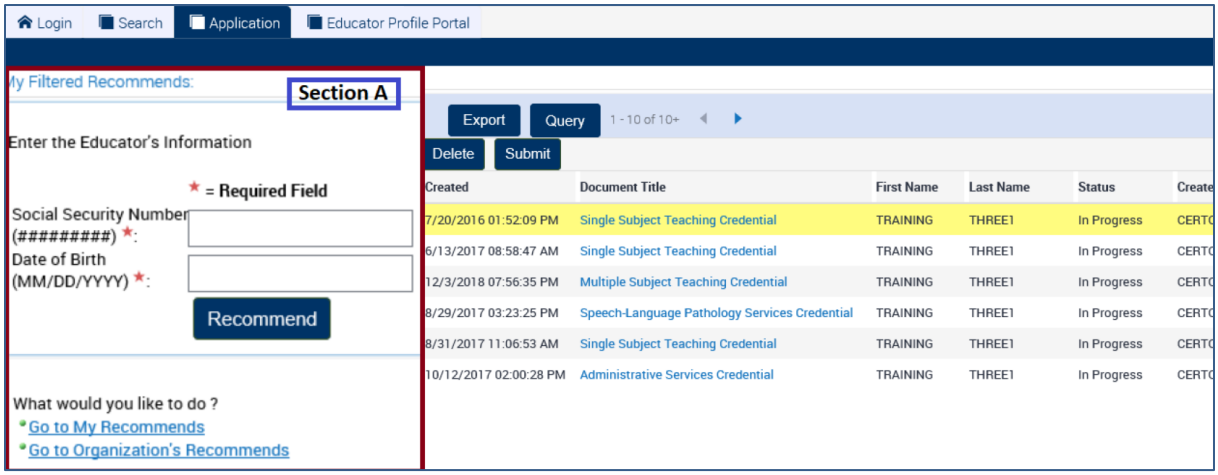
Click the *Application* tab.



My Filtered Recommends view

From this view, you may be able to:

- Start the recommendation submission process for an educator
- Go to the *My Recommends* view
- Go to the *Organization's Recommends* (Authorized Designee only) view



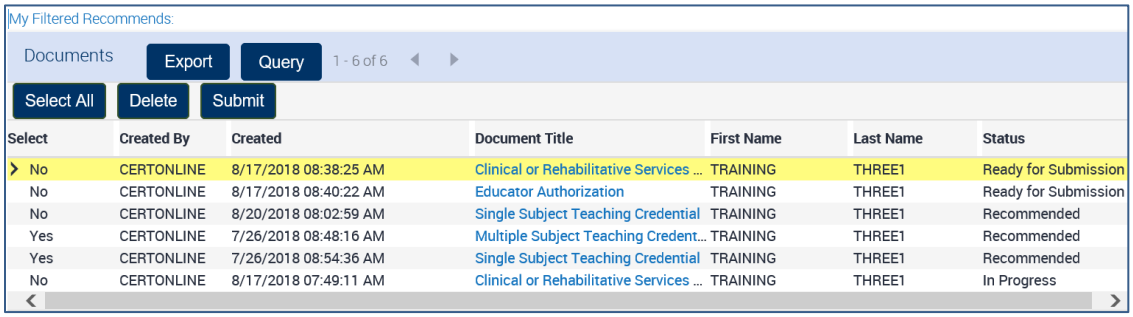
Agency User – My Filtered Recommends

The *My Filtered Recommends* view will display after the Authorized Submitter has logged in and then clicked the *Application* tab.

The *My Filtered Recommends* is the default view and displays only those documents submitted by the Authorized Submitter. This view will also display when the ***Go to My Filtered Recommends*** link is selected from the *My Recommends* or the *Organization Recommends* view.

Documents with a status listed below will display in this view. The definitions for each status can be found in the Glossary and in Appendix B of the CTC Online Recommendations - Credential Types and Codes document available.

- In Progress
- Ready for Submission
- Recommended
- Educator Return
- Awaiting Payment



From this view:

- Click on the *Document Title* to view and edit the document details on *Document*

Detail view.

  - View the *Go to Edit Document* section under *Approved Institutions* or *Authorized Agencies* for more information.

- Select one or more documents with the "Ready for Submission" status to submit to the educator.
- Select one or more documents to delete.
- Export data and run queries for reports.
- Search for an educator using the *Educator Profile Portal* or *Search* tab.
- Go to *My Recommends.*
- Go to *Organization's Recommends* (Authorized Designee only).
- Start the recommendation submission process for an educator.
  - View the *Start an Online Recommendation* section for more information.

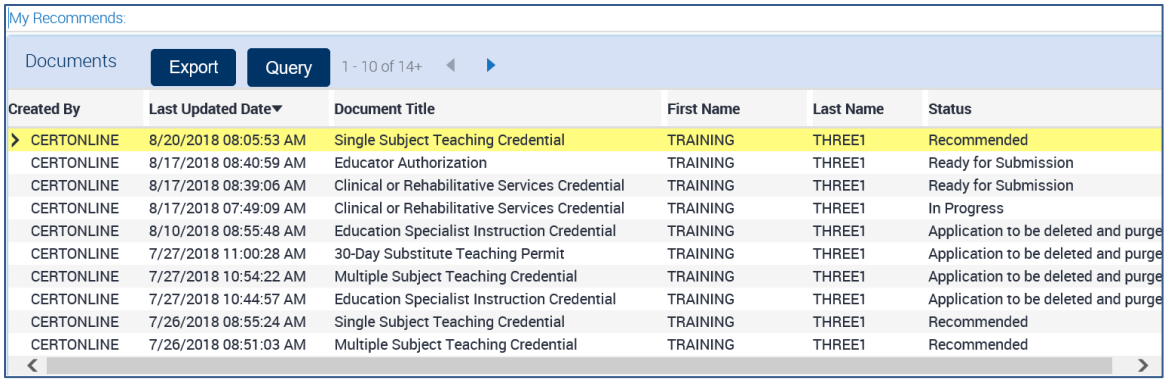
Agency User – My Recommends

The *My Recommends* view will display after the Authorized Submitter has logged in, clicked on the *Application* tab and then clicked the *Go to My Recommends* link.

The *My Recommends* view displays only those documents submitted by the Authorized Submitter. This view will also display when the *Go to My Recommends* link is selected from the *My Filtered Recommends* or the *Organization's Recommends* views.

Documents with a status listed below will display in this view. The definitions for each status can be found in the Glossary and in Appendix B of the CTC Online Recommendations - Credential Types and Codes document available.

- Application to be deleted and purged
- In Progress
- Ready for Submission
- Recommended
- Educator Return
- Awaiting Payment
- Pending Evaluation
- Pending Additional Evaluation
- Returned for Additional Information
- Granted



Created By	Last Updated Date	Document Title	First Name	Last Name	Status
CERTONLINE	8/20/2018 08:05:53 AM	Single Subject Teaching Credential	TRAINING	THREE1	Recommended
CERTONLINE	8/17/2018 08:40:59 AM	Educator Authorization	TRAINING	THREE1	Ready for Submission
CERTONLINE	8/17/2018 08:39:06 AM	Clinical or Rehabilitative Services Credential	TRAINING	THREE1	Ready for Submission
CERTONLINE	8/17/2018 07:49:09 AM	Clinical or Rehabilitative Services Credential	TRAINING	THREE1	In Progress
CERTONLINE	8/10/2018 08:55:48 AM	Education Specialist Instruction Credential	TRAINING	THREE1	Application to be deleted and purge
CERTONLINE	7/27/2018 11:00:28 AM	30-Day Substitute Teaching Permit	TRAINING	THREE1	Application to be deleted and purge
CERTONLINE	7/27/2018 10:54:22 AM	Multiple Subject Teaching Credential	TRAINING	THREE1	Application to be deleted and purge
CERTONLINE	7/27/2018 10:44:57 AM	Education Specialist Instruction Credential	TRAINING	THREE1	Application to be deleted and purge
CERTONLINE	7/26/2018 08:55:24 AM	Single Subject Teaching Credential	TRAINING	THREE1	Recommended
CERTONLINE	7/26/2018 08:51:03 AM	Multiple Subject Teaching Credential	TRAINING	THREE1	Recommended

From this view:

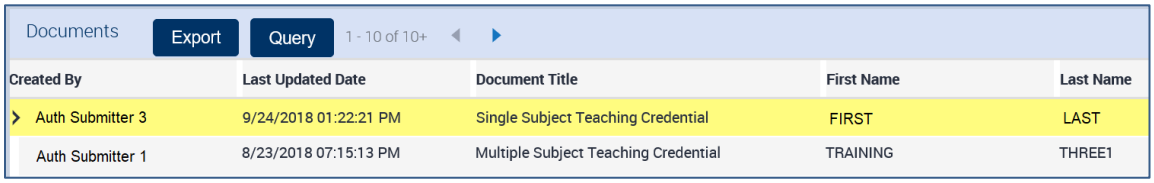
- Query and export data for reports.
- Search for an educator using the *Educator Profile Portal* or *Search* tab.
- Go to *My Filtered Recommends.*
- Go to *Organization's Recommends* (Authorized Designee only.
- Start the recommendation submission process for an educator.
    - Go to the *Start an Online Recommendation* section for information on how to submit an online recommendation.

Agency User – Organization Recommends (Authorized Designee)

The *My Organization Recommends* view will display after the Authorized Designee has logged in, clicked on the *Application* tab and then clicked *Go to Organization's Recommends*.

The *Organization Recommends* view displays of documents submitted by all Authorized Submitters of an organization. This view is available only to an Authorized Designee. This view will also display *Go to Organization's Recommends* is selected from the *My Filtered Recommends* or the *My Recommends* views.

Documents cannot be accessed through this view.



Created By	Last Updated Date	Document Title	First Name	Last Name
Auth Submitter 3	9/24/2018 01:22:21 PM	Single Subject Teaching Credential	FIRST	LAST
Auth Submitter 1	8/23/2018 07:15:13 PM	Multiple Subject Teaching Credential	TRAINING	THREE1

Agency User – Educator Profile versus User ID and Password

Educator Profile versus the Educator's User ID and Password

These items have different purposes and both are required to complete the online

recommendation process.

- **Educator Profile**

  An individual who has previously submitted an application to or was issued a document by the Commission has an existing educator profile. For individuals who do not have an ***existing*** Educator Profile, it is created by entering the educator's Social Security Number and Date of Birth combination twice.

- **Educator User ID and Password**

  An educator must enter a valid User ID and Password to access their online Educator Profile. Educators who do not have a valid User ID and Password must use the *Create Educator Account* link to create them before the educator can log into the CTC Online system.



Educators with an ***existing*** Educator Profile with the Commission must create a valid User ID and Password if they have not logged in since February 2017.

Agency User – Start an Online Recommendation

Review the CTC Online Frequently Asked Questions (FAQ) for additional information on the online recommendation process.

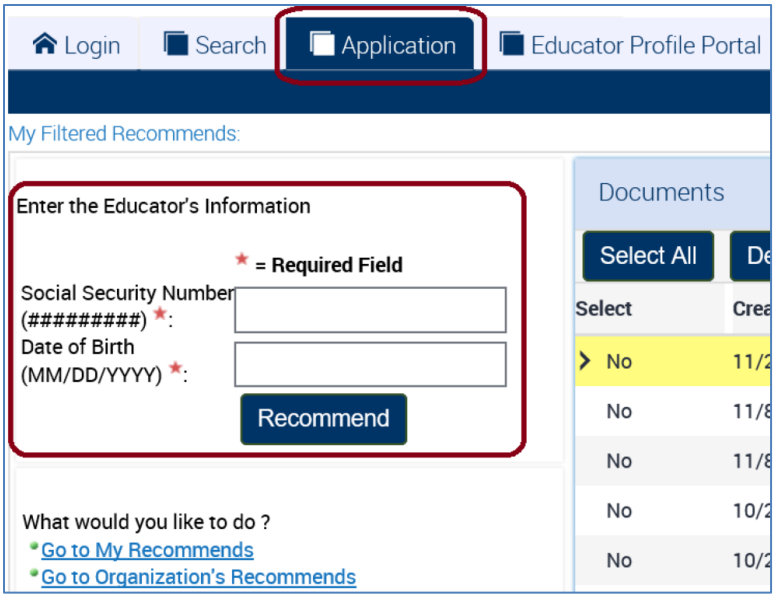
When an Authorized Submitter has logged into the CTC Online system and clicked on the *Application* tab, the *My Filtered Recommends* view displays. This view, as well as the *Go to My Recommends* and *Go to Organization's Recommends* view, can be used to start the recommendation process.

My Filtered Recommends view

Enter the Educator's **Social Security Number (SSN)** and **Date of Birth (DOB)**.

Click ***Recommend***.

- If successful, the *Educator Information* view will display.
- If unsuccessful, the SSN and DOB error message will display.
  - If appropriate, create the new educator profile.

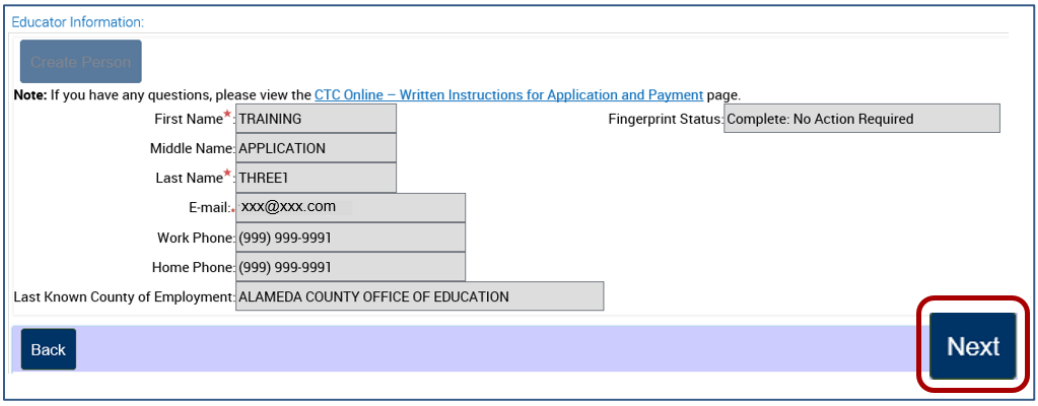


Educator profile exists

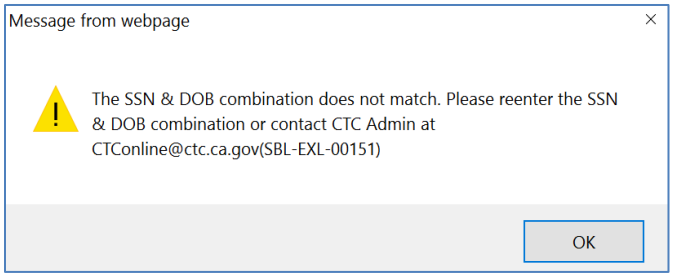
When the **SSN** and **DOB** combination *matches* our records, the *Educator Information* view displays with pre-populated information.

- The ***Create Person*** button is not available on this view.
- The information displayed is provided in a read-only view and is for verification purposes only.

Click ***Next*** to continue to the *Educator Detail* view.



When the **SSN** and **DOB** combination entered is not an exact match to an existing educator profile the message below will display.



Do not create a **new** educator profile when it is **known** that the educator has an existing educator profile. Refer to the Troubleshooting SSN and DOB Issues section for additional information.

Creating a new educator profile

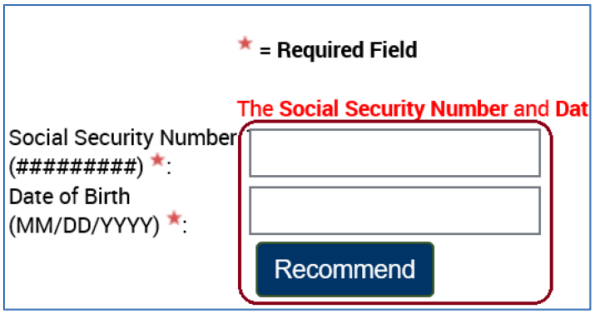
When the **SSN** and **DOB** combination *is not* an exact match to our records, you will re-enter the **SSN** and **DOB** to create the Educator's profile.

The re-entered **SSN** and **DOB** information will be used to instantly create the Educator profile.

The full text of the error message reads:

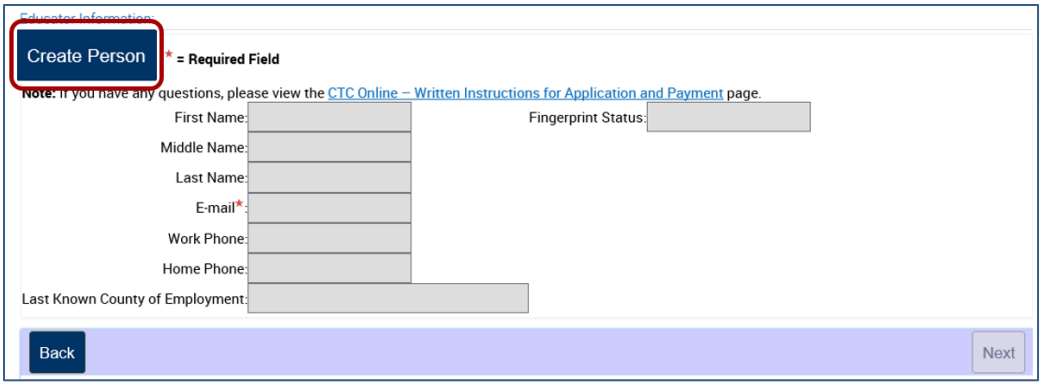
The **Social Security Number** and **Date of Birth** does not exist in the Database. Re-enter the **Social Security Number** and **Date of Birth**.

- Enter the educator's **Social Security Number**
- Enter the educator's **Date of Birth**
- Click ***Recommend***



The *Educator Information* view will be blank and the ***Create Person*** button will be available.

- Click ***Create Person*** to open the fields.



Enter Educator's information. The minimum required fields on this view are:

- First Name
- Middle Name (if given)
- Last Name
- E-mail address

Educator's Personal Information

The name entered on the Educator Profile must be the Educator's full legal name. (Title 5 California Code of Regulations §80002).

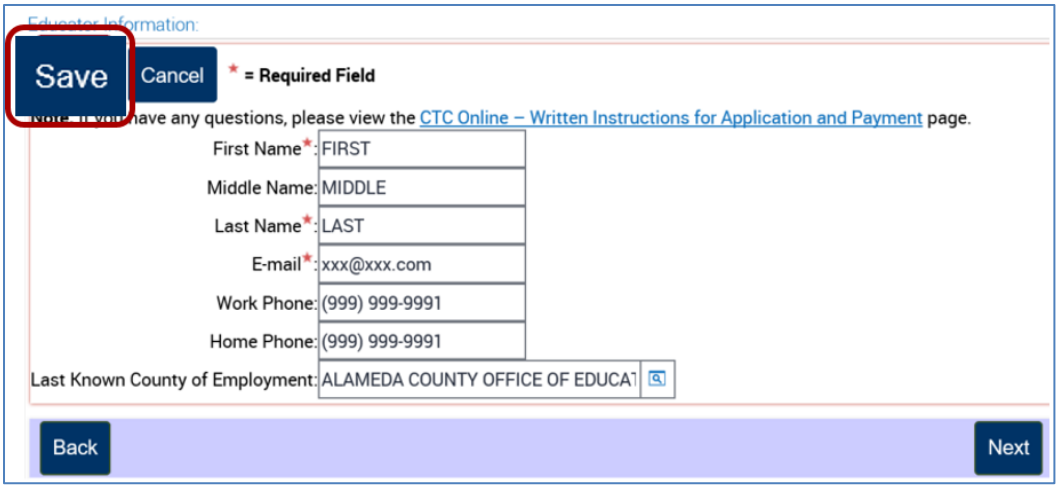
The educator's name entered on this view will display on the *Searches*, *Documents*, *Educator* and *Agency User* views.

E-mail address

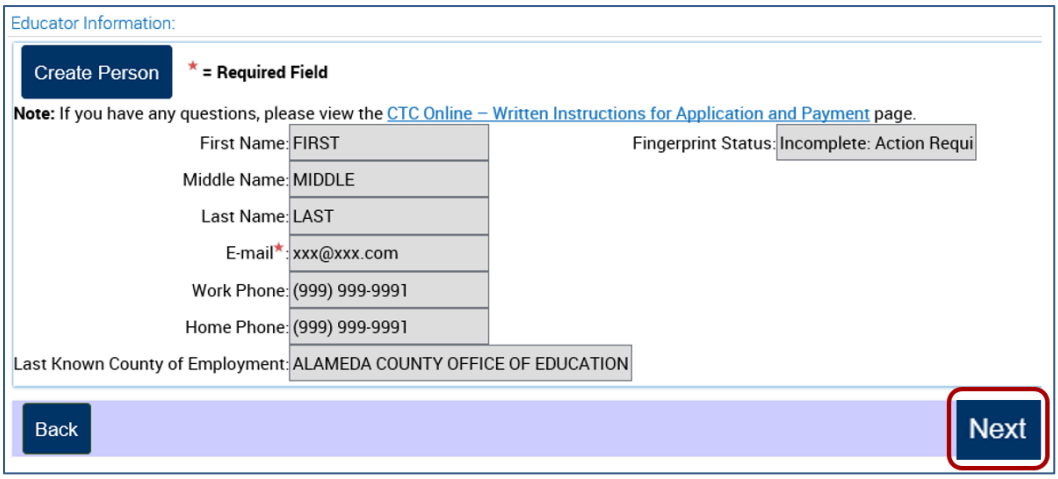
The Authorized Submitter must verify the educator's email address is correctly entered. Emails are generated from the CTC Online system and are sent to the email address listed in the Educator's Profile.

Click ***Save.***

The ***Back*** button will **save** the information and return to the *My Filtered Recommends* view.



- Carefully review the spelling of the Educator's name and their email address.
- Click ***Next.***



Troubleshooting SSN, DOB & Name Issues

In ***all*** cases where an Educator Profile was created with an incorrect SSN, DOB, or Name, the Educator is required to complete Form 41-NC Request to Change Name or Personal Profile and mail it to the Commission. There is no fee for submitting this document. The educator profile(s) must be merged and/or name corrected before a new application and/or fingerprint clearance can be processed.

An Educator Profile was created entering an **incorrect Social Security Number and/or Date of Birth**

The Educator shall not complete a recommendation using an incorrect SSN and/or DOB. (Title 5 California Code of Regulations §80002).

When it is determined the educator's SSN and/or DOB was incorrectly entered when the Educator Profile was created, the Authorized Submitter **must not** create a second Educator Profile.

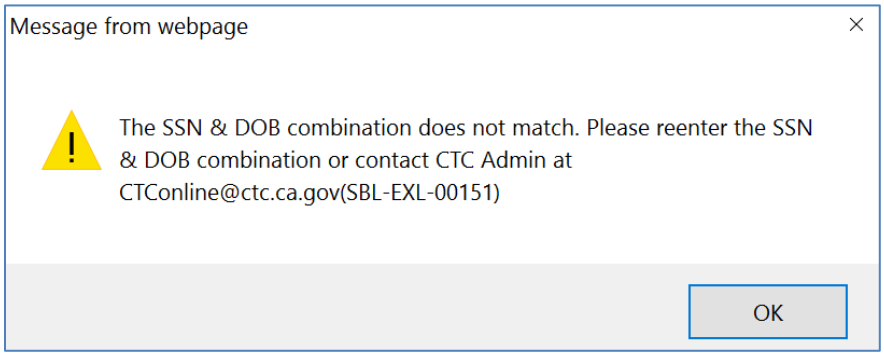
The Educator Profile information must be corrected by Commission staff before a new recommendation can be submitted to the Educator. Notify the Educator that the educator **must** complete Form 41-NC Request to Change Name or Personal Profile and mail it to the Commission to correct the educator's Educator Profile. There is no fee for submitting this document.

The Authorized Submitter can select and delete the document from the *My Filtered Recommends* view. This will also remove the document from the *Authorized Submitter/Organization* views.

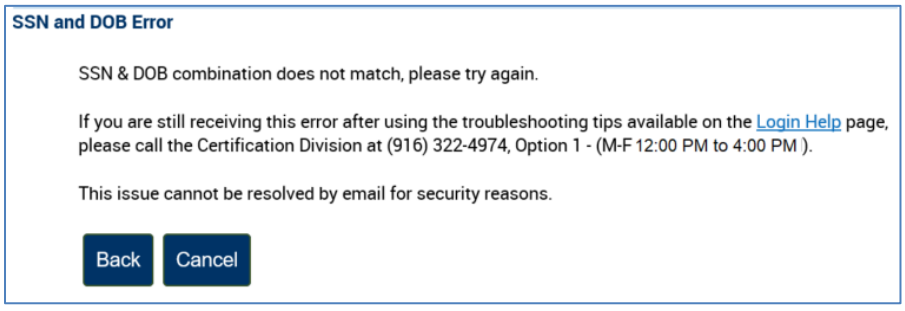
After the Educator Profile has been corrected, the Authorized Submitter submits a new recommendation entering the educator's correct SSN and DOB.

Error Messages

- Authorized Submitters will receive this message when the information entered is not an exact match to an educator's *existing* profile.



- Educators will receive the message below when using the *Create Educator Account* link and the information entered is not an exact match to their *existing* profile.

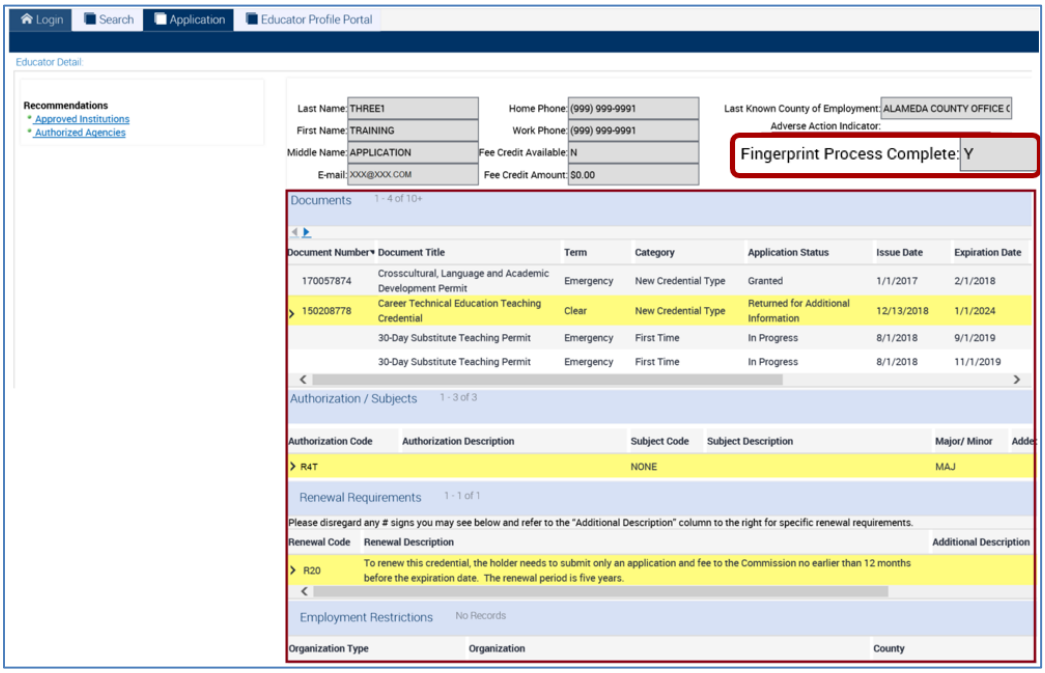


Agency User – Educator Detail

The *Educator Detail* view displays after the ***Next*** button is selected from the *Educator Information* view after entering an educator's **Social Security Number** and **Date of Birth**. The *Educator Detail* view displays personal information as well as credential information in a read-only format and is for verification purposes only. Use the arrows to sort and view the available information.

A "**Y**" in the *Fingerprint Process Complete* indicator does not authorize the educator to be placed in the classroom. Its purpose is to indicate whether the fingerprint information from the FBI and DOJ has been received by the Commission.

The *Fingerprint Process Complete* indicator does not prevent an educator from completing and submitting an application and payment through the recommend, renewal or web application processes.



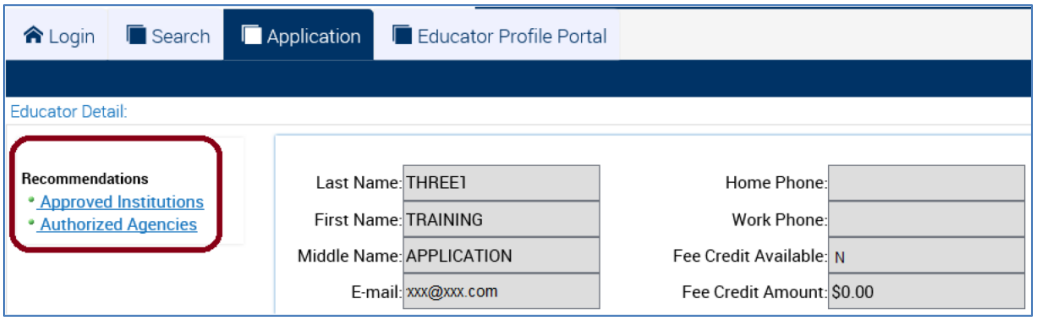
Approved Institution and Authorized Agencies links

Depending on the responsibilities of the Authorized Submitter, one or more links will display on the *Educator Detail* view under the ***Recommendations*** section.

- The *Approved Institutions* link is available to:
  - Institutions of Higher Education
  - Authorized Agencies with Commission-approved programs
- The *Authorized Agencies* link is only available to employing agencies.

The type of document determines which link is selected. The two links are described below.

- The *Approved Institutions* link is for documents which are earned as the result of the educator completing an Organization's Commission-approved preparation or subject matter program.
- The *Authorized Agencies* link is for document(s) which do not require completion of a Commission-approved program. These documents are only submitted by employing agencies.



Approved Institutions

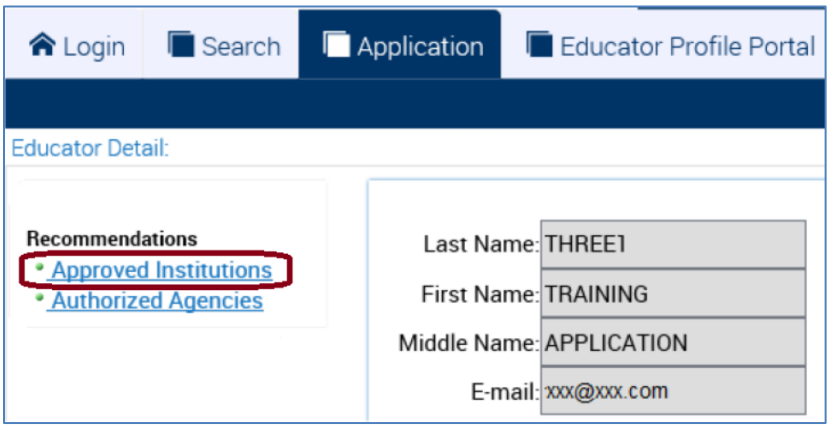
The steps to start an online Recommendation for a document earned through the completion of a Commission-approved preparation or subject matter program are:

- Log into the CTC Online system
  - When the *Welcome Back* view displays, click the *Application* tab
  - If you are logged in, click the *Application* tab
- Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)
- Click ***Recommend***
- If appropriate, re-enter the Educator's **SSN** and **DOB** to create the online profile
  - Click ***Recommend***
- Enter or verify the information on the *Educator Information* view

- If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more information.

➢ Click ***Next***

➢ Click ***Approved Institutions***



Approved Institutions view

This is the starting point for creating, editing, deleting and submitting a document recommendation that is part of a commission-approved program.

Review the educator's documents displayed on this view to determine the credential type, base document, expiration dates, or other information which is applicable for the new document.

The information displayed on this view is provided in a read-only view and is for verification purposes only.

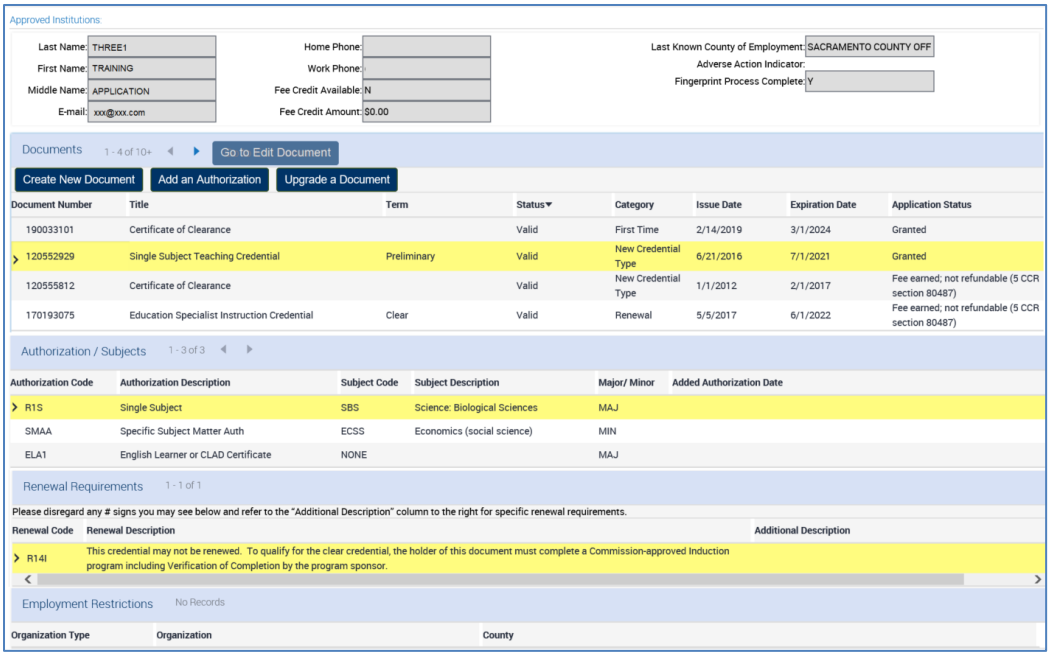
Only documents with a **Document Number** and an Application Status of **Valid** have been issued to the educator.

Click on a ***Document Number*** to highlight the row and view the document's details.

When you are ready to start the recommendation process, click on the appropriate recommendation option. The following four recommendation options may be available on this view:

Create New Document Upgrade a Document

Add an Authorization Go to Edit Document



Approved Institutions - Resources

Credentials available under the *Approved Institutions* link require an educator to complete a Commission-approved preparation program. With the implementation of the CTC Online system, an authorized submitter's list of approved programs and subject areas is filtered based on the Commission's list of approved programs for the organization.

The CTC Online – Processing Recommendations section of the Credential Information Guide provides additional information and guidance to employers in electronically submitting applications for credential recommendations.

From this view:

- The ***Create New Document*** button is for creating first time or new type documents based on completion of a Commission-approved preparation program. This button is always active.
- The ***Add an Authorization*** button is for adding other authorization(s) to an existing document based on completion of a Commission-approved authorization program. This button is active when a document with a status of "**Valid**" is selected.
- The ***Upgrade a Document*** button is for upgrading a **Preliminary** or **Level I** document to a **Clear** or **Level II** document based on completion of a Commission-approved preparation program. Upgraded documents are considered a Renewal (RN) or Reissuance (RI) of the existing document. This button is active when a document with a status of "**Valid**" is selected.

- The ***Go to Edit Document*** button is for editing details of a document created by the Authorized Submitter and is active when a document does not have the status of "**Application to be deleted and purged**" or the application and payment has not yet been submitted by the educator to the Commission.

Approved Institutions – Create New Document

Credential categories of First Time (FT) and New Type (NT), as well as specific Methodology areas, and Educator Authorizations (C8), based on Commission-approved preparation programs are available under this option. Additional authorizations which are not constrained to an organization's approved preparation or subject matter programs, such as Supplementary or Subject Matter Authorizations, may only be added to the initial FT or NT document during this process.

This section describes the process for creating a recommendation for the following credential:

- **Preliminary Single Subject Teaching Credential** with three authorizations: Art, Biological Sciences (Supplemental) and Bilingual Authorization in Spanish

Approved Institutions view

The *Approved Institutions* view is the starting point for creating, editing, deleting and submitting a document recommendation for an educator.

Review the educator's information

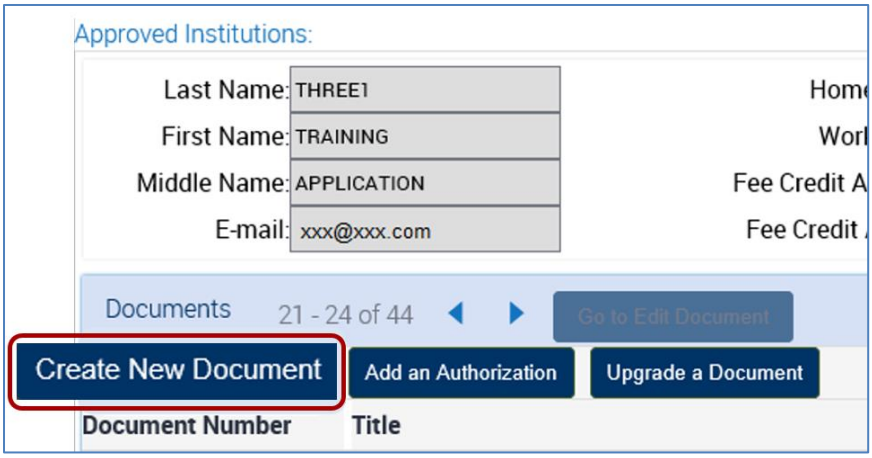
Review the educator's information to verify the recommendation is appropriate and the new document's category.

Create the *first* section of the document

From the *Approved Institutions* view, the ***Create New Document*** button will open the *Document Detail – Authorization/Subjects* view.

A document is created when the Authorized Submitter completes the required sections for the specific document. All new documents are created using the ***Create New Document*** button.

Click ***Create New Document***.

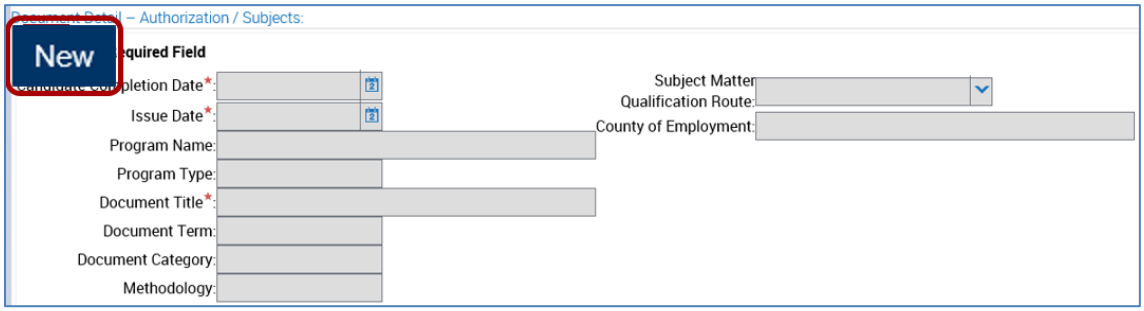


Document Detail – Authorization/Subjects view

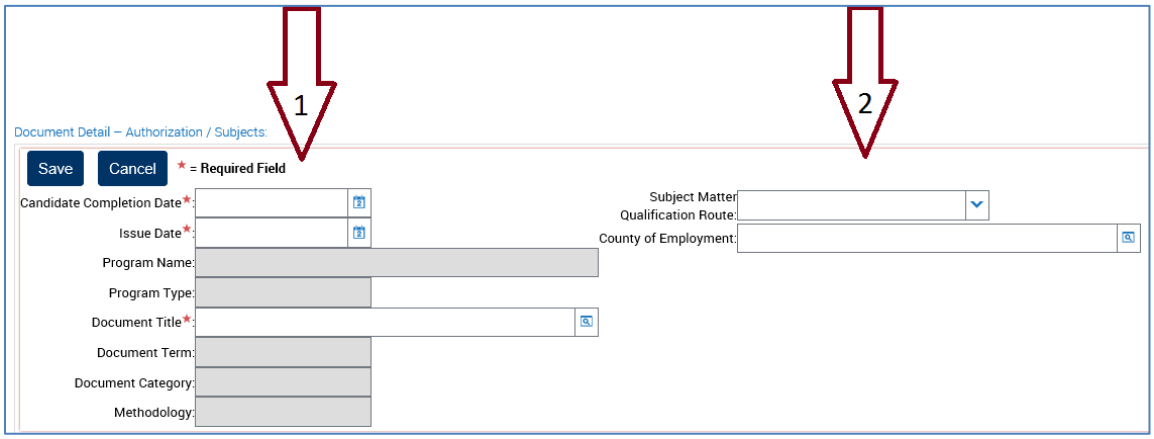
Required fields are marked with an asterisk * symbol.

Create the Document

Click the ***New*** button to open the fields.



Enter the information moving from the left top to bottom, then the right top to bottom.



Candidate Completion Date field

This is the date the educator completed the final requirement that qualifies the educator for the document as determined by the program.

For either District or University Interns, the Candidate Completion Date is the date all of the intern pre-service requirements applicable for the educator and the organization offering the Commission-approved program have been met by the candidate.

The Candidate Completion Date will then filter out programs on the Credential Title list based on the Program Standard Approved Date and the Final Completion Date. The Candidate Completion Date will also check whether the candidate completed the authorization program within the organization's approval time frame.

Determine the Issue Date

This issue date is based upon the following:

- The date the educator completed the final requirement that qualifies the educator for the document as determined by the program
- the Beginning Date of Service for Intern programs

The Commission will honor the issuance date entered by the Authorized Submitter when it is after the date the educator has completed all requirements for the document. The date must be no more than 90 days prior to the day it is paid for and received by the Commission.

Date fields

- Enter the date the educator completed the program in the ***Candidate Completion Date*** field.
- Enter the document's effective date in the ***Issue Date*** field.

There are two options available for entering a date in the ***Date*** fields.

- Enter the date with the (MM/DD/YYYY) format to populate the field.

OR

- Click the ***Date*** field calendar icon, select the month and year then click on a date.
  - Click ***DONE*** to populate the field.

Document (Credential) Title *field*

Select the **Document Title, Term, and if appropriate the Methodology,** for the document. If the document title is not listed, please go to the Agency User – Authorized

Designees and Submitters section for information on how to contact the Commission.

There are two options available for populating the ***Document Title*** field.

Enter the Document Title in the ***Document Title*** field.

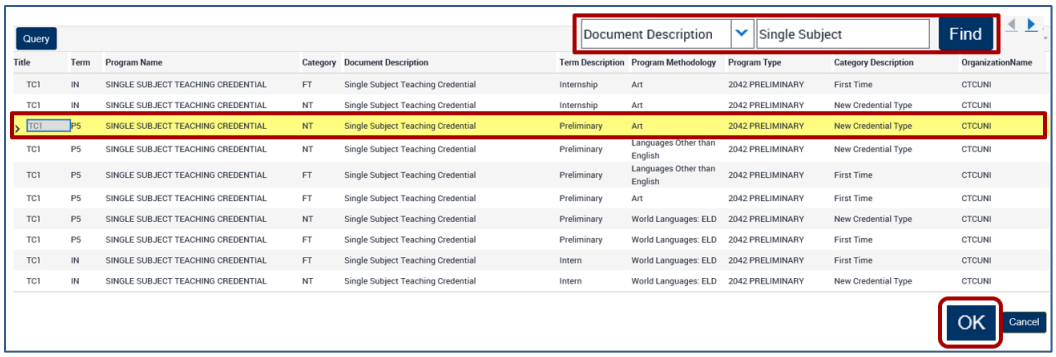
- Enter part of the Document Title in the ***Document Title*** field to view a pop-up window displaying all matching documents. e.g. Single Subject, Multiple Subject, Education Specialist, etc.

  Data in this field is case sensitive.

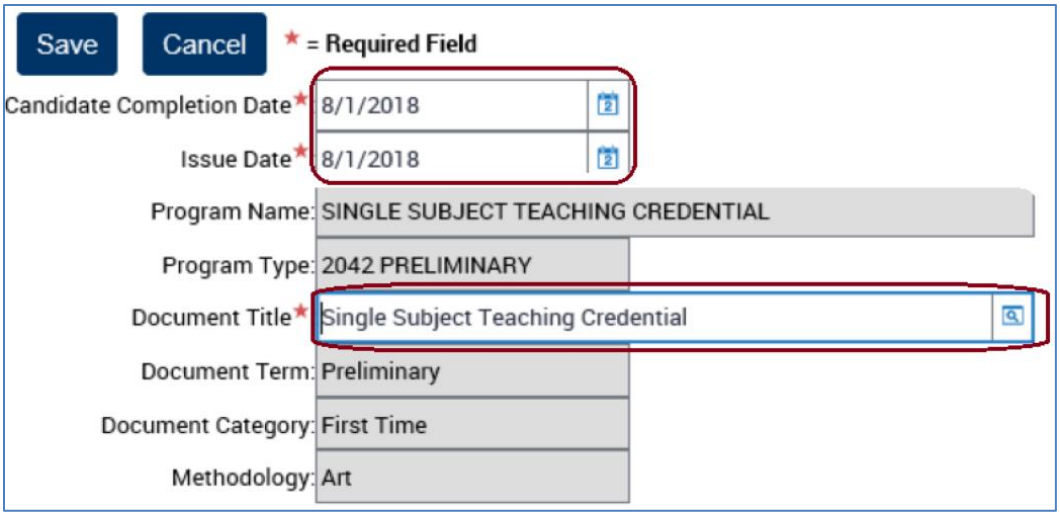
OR

Click the ***Document Title*** field pick applet to view a pop-up window displaying all documents available to the Authorized Submitter.

- Change the search field from ***Title*** to ***Document Description.***
- Enter the Document Description, e.g. Single Subject, Multiple Subject, Education Specialist, etc.
- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row to select the correct **Program Name, Term, Term Description, Category, and Program Methodology**.
- Click ***OK*** to populate the fields.



In the event the wrong document is selected, repeat the previous steps to enter the correct Document information.



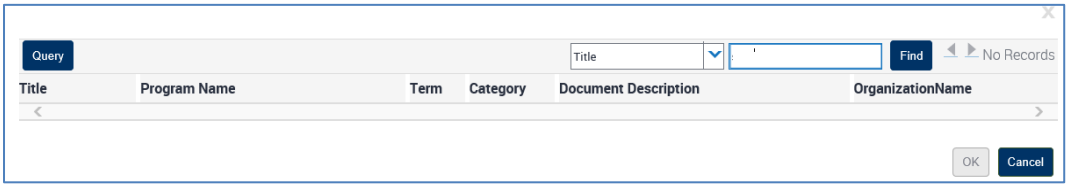
Troubleshooting a blank pop-up window.

When a blank pop-up window appears, please check the following:

- The information entered is not an exact match to the available information.

  The information in the field is case sensitive.

- Check with your Organization's Authorized Designee to confirm you have been authorized to submit the recommendation. If you have been authorized, please email CTCOnline@ctc.ca.gov describing the problem and identify which Programs and/or Authorization Codes are needed as your User ID may not be properly linked.



Subject Matter Qualification Route field

Identifies the route used to meet subject matter was earned for a document. Select the appropriate route from the following options: *Examination*, *SM at different IHE*, or *SM at the recommending IHE*.

Select the ***Subject Matter Qualification Route***.

- Click the ***Subject Matter Qualification*** field arrow to view the drop down menu displaying a list of qualification routes.
- Select the appropriate route to populate the field.

County of Employment field

There are two options available for populating the ***County of Employment*** field.

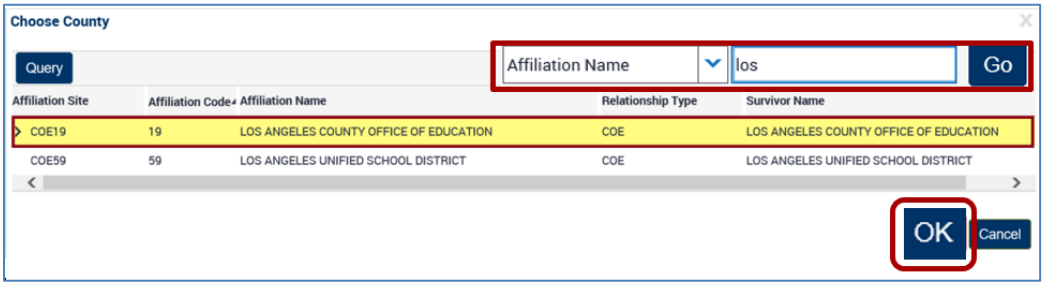
Enter the educator's County of Employment (COE) in the ***County of Employment*** field.

- If there is an exact match to the entered information, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***County of Employment*** field pick applet to view a pop-up window displaying all COE information.

- Change the search field from ***Affiliation Site*** to ***Affiliation Name*** as needed to query by name**.**
- Enter the educator's County Office of Employment.
- Click the ***Go*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct COE information.
- Click ***OK*** to populate the field.

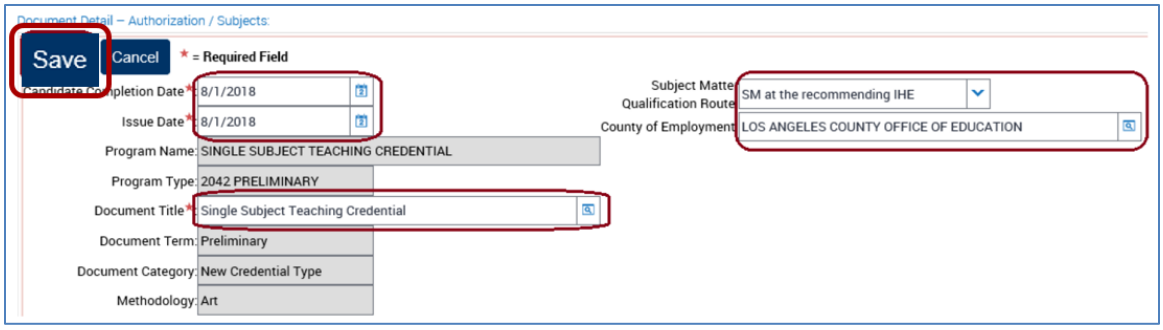


All of the fields for the ***Document Detail - Authorization/Subjects*** view are populated.

Review the information for accuracy.

- When information in a field is incorrect, select an editable field, delete the information and repeat the previous steps for entering the correct information in that field.

Click ***Save*** to complete this section.

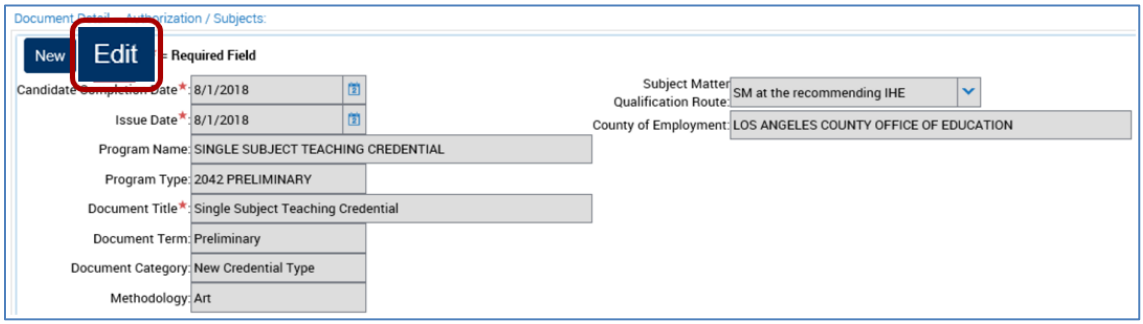


In the example below, the ***Save*** button was selected.

The *first* section of the document has been successfully created and saved.

The ***Document Detail – Authorization/Subjects*** section displays a Preliminary Single Subject Teaching Credential in Art.

When information in a field is incorrect, click the ***Edit*** button to open the editable fields.

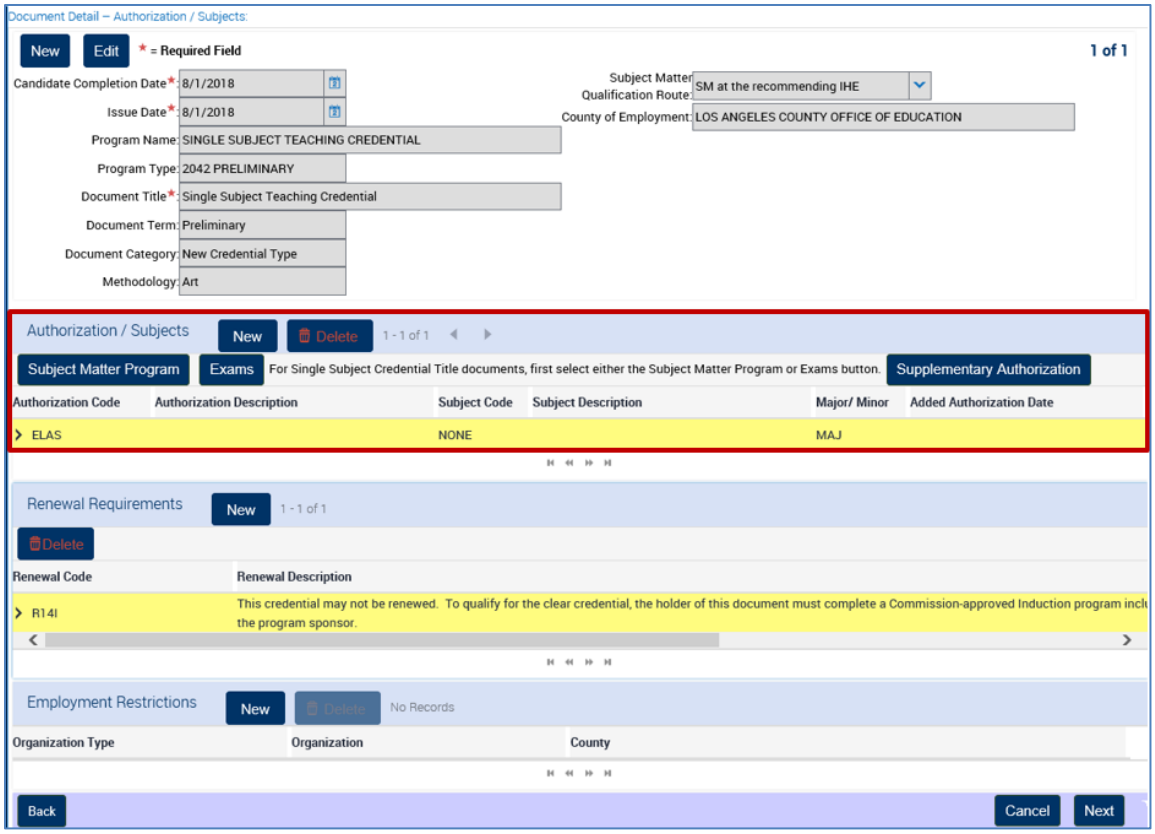


Create the *second* section of the document

The *second* section of the document is active after the information for first section has been saved. The ***Authorization/Subjects*** button is selected by default.

Some of the ***Authorization/Subjects*** and ***Renewal Requirements*** fields have been pre-populated based on the document selected in the *first* section.

For the example below, the first subject entered for general education credentials and the program's methodology **must** match the Qualification Route listed in the *first* section. Click the Subject Matter Program button to enter Art as the document's first subject.



Authorizations/Subjects

There are four categories of authorizations which may be added to a document.

The Authorization/Subjects listed on a teaching or services document must include at least one major subject or authorized area, and may include an emphasis, minors, or supplementary/subject matter authorizations. Teaching credentials must also include an English Learner authorization. It is important to understand the differences and select the appropriate authorization for the credential type.

Go to the CTC Online Recommendations – Credential Types and Codes chart for additional information.

Enter the major authorizations/subjects in the following order (as applicable to the educator and program):

- Select the appropriate button (Exams or Subject Matter Program) to enter the ***first*** authorization.

  For general education credentials, the first subject entered for the credential and the program's methodology **must** match the Qualification Route listed in the *top* section.

  Additional authorizations are entered as follows:

  - Click the ***Exams*** button to enter additional major authorizations earned by

passage of an Exam.

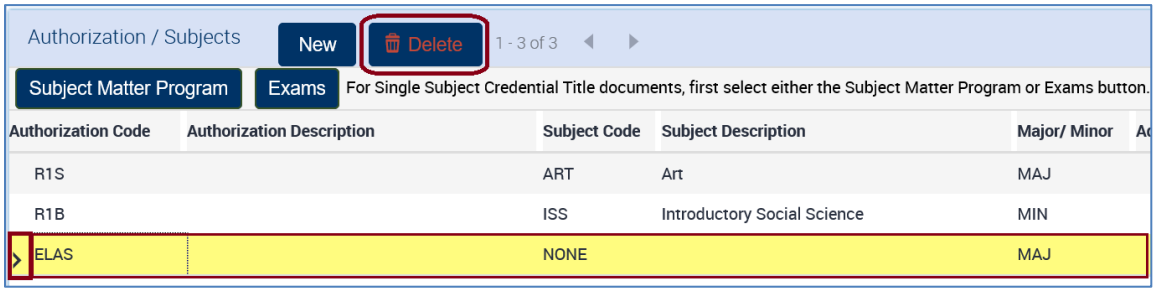
- Click the ***Subject Matter Program*** button to enter additional major authorizations earned resulting from the completion of a Commission-approved subject matter program.
- Click the ***Authorization*** button to enter any other authorization/subjects earned from the completion of a Commission-approved program. This is the only time additional authorizations (major or minors) earned *outside* of the approved institution/organization's programs can be added to a document.

  In addition, the ***Authorization*** button is used to delete the pre-populated English Learner Authorization (ELA) and enter the Bilingual Authorization (BA) earned resulting from the completion of a Commission-approved authorization program.
- Select the ***Authorization*** button and then the **Supplementary Authorization** button to enter the **minor** subject matter/supplementary authorizations earned resulting from the completion of specific *coursework or semester units* in the following order:
  - Enter Subject Matter authorizations
  - Enter Supplementary authorizations

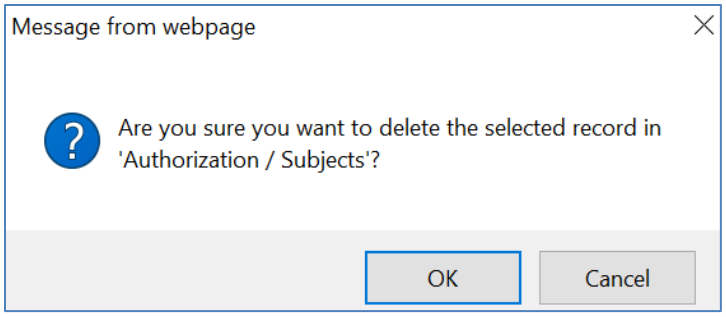
How to Delete information

The ***Delete*** button is active when a row of information that you have entered has been selected.

- Click on a row to select the information to delete.
- Click ***Delete***.



- Click ***OK*** on the pop-up window to delete the selected record.



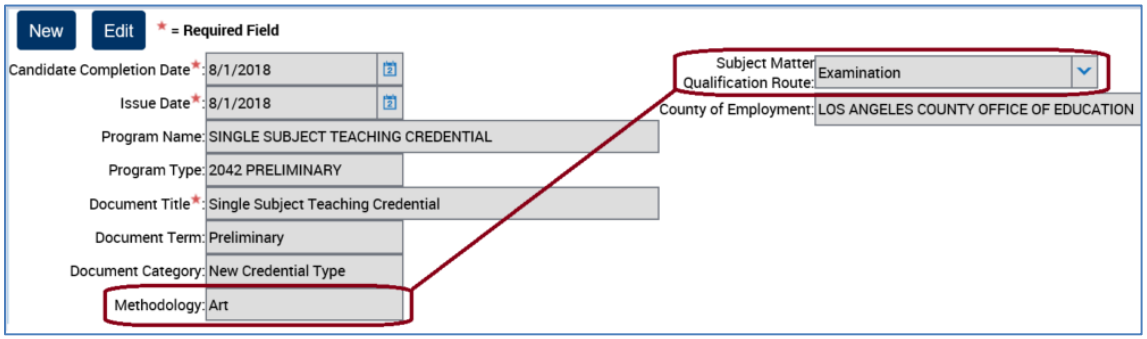
Exams

This is the first authorization entered when the *Subject Matter Qualification Route* entered in the *top* section is “Examination”.

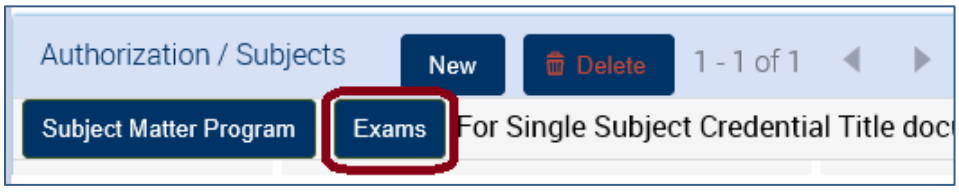
Additional authorizations earned by passage of an Examination are entered using the ***Exams*** button.

Do not use the **Examination** and the **Subject Matter Program** process for the same subject area.

The example below shows the first section of the document with the Subject Matter Qualification Route as “Examination”.



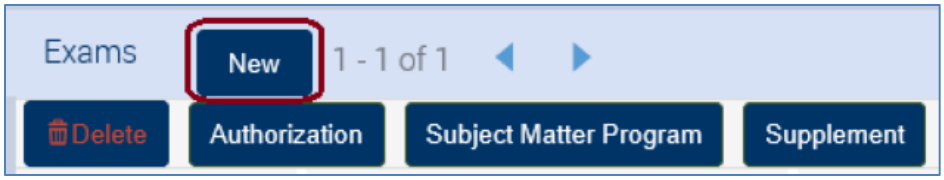
Click the ***Exams*** button.



Exams view

The section title changes to ‘**Exams**’ and a new set of buttons display.

Click the ***New*** button to open the fields.



Authorization Code field

There are two options available for populating the ***Authorization Code*** field.

Enter the *Authorization Code* in the ***Authorization Code*** field.

- If there is an exact match to the entered information, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***Authorization Code*** field pick applet to view a pop-up window displaying all Authorization Codes.

- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct *Authorization Code and Subject Description*.
- Click ***OK*** on the pop-up window to populate the field.

Added Authorization Date field

The **Added Authorization Date** field is left blank unless you are adding an authorization to an existing document.

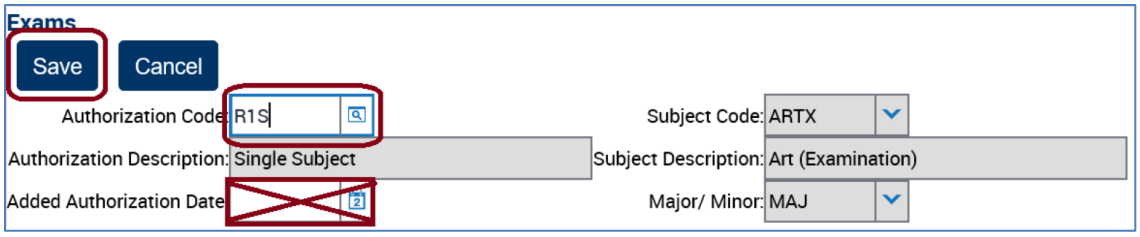
All of the fields for the ***Exams*** view are populated.

Review the information for accuracy.

- When information in a field is incorrect, click on the ***Authorization Code*** field and either delete the information or click the pick applet, and repeat the previous steps for entering the correct information.

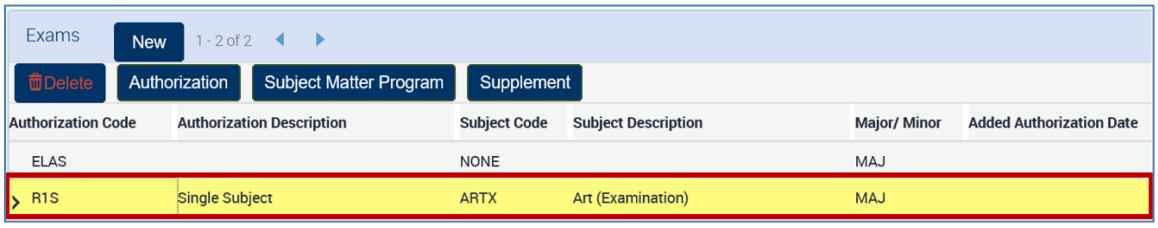
Click ***Save*** to complete this section.

Repeat the previous steps for subsequent authorizations as needed.



The *second* section of the document has been successfully created and saved.

The **Exams** section displays the Art by Exam (R1S) and the pre-populated the English Learner Authorization for Single Subjects (ELAS).



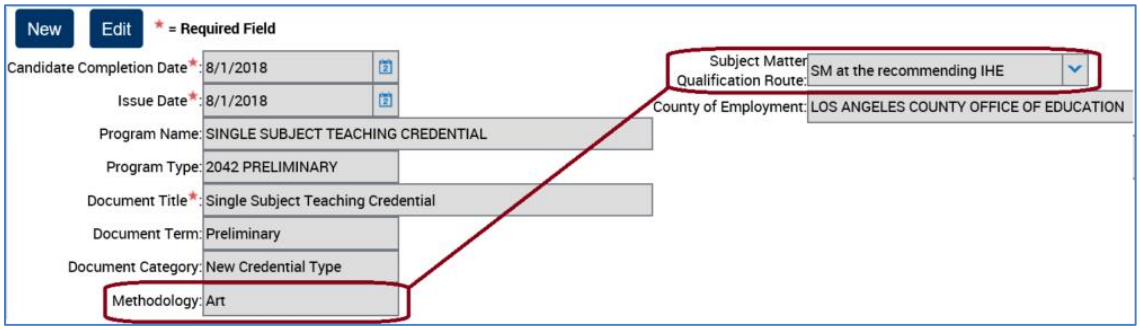
Subject Matter Program

This is the first authorization to enter when the *Subject Matter Qualification Route* entered is 'SM at the recommending IHE' or 'SM by another IHE' in the *top* section.

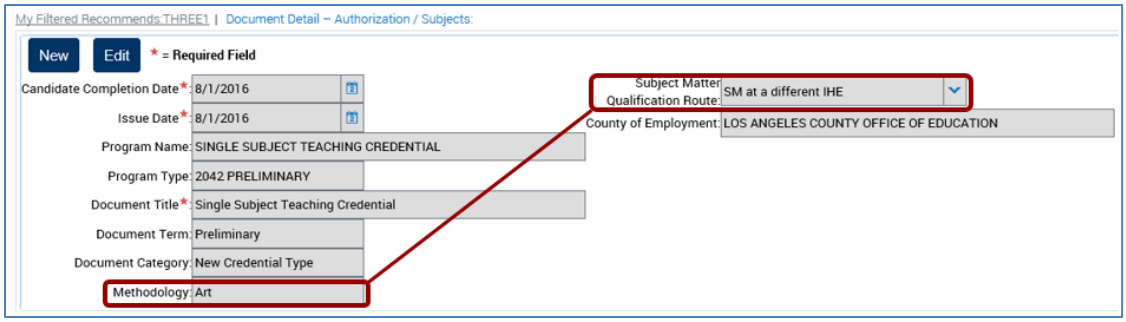
Additional authorizations earned through a Commission-approved Subject Matter Program are entered using the ***Subject Matter Program*** button.

Do not use the **Subject Matter Program** and the **Examination** process for the same subject area.

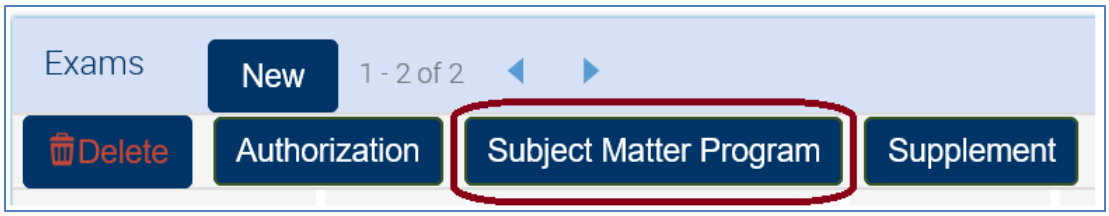
The example below shows the first section of the document with the Subject Matter Qualification Route as either "SM at the recommending IHE" or "SM by another IHE".



OR



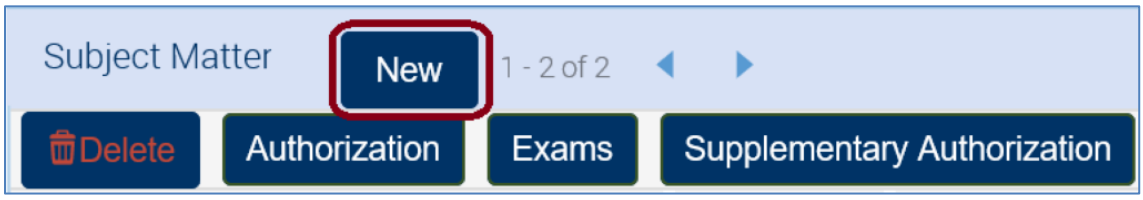
Click the ***Subject Matter*** button.



Subject Matter view

The section title changes to '**Subject Matter**' and a new set of buttons display.

Click the ***New*** button to open the fields.



Organization field

The Organization to which the authorized submitter is linked will automatically populate in the *Organization* field.

When the *Subject Matter Qualification Route* entered in the top section is '*SM at a different IHE*', the Organization field must be changed to list the Organization where the Educator completed the Subject Matter Program that qualified the educator for the document.

For **Special Education Instruction Credentials**, the Subject Matter Program information is not entered even when the Subject Matter Qualification Route selected is "SM by IHE" or "SM by another IHE".

There are two options available for changing the ***Organization*** field.

Enter the correct Organization in the ***Organization*** field.

- If there is an exact match to the information entered, the field will populate.

- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***Organization*** field pick applet to view a pop-up window displaying all Organizations.

- Click in the first data field and select a different column name, e.g. **Affiliation Name.**
- Enter the Organization Name, e.g. **California State University** in the second data field.
- Click the ***Go*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct Organization information.
- Click ***OK*** on the pop-up window to populate the field.

Authorization Code field

For general education credentials, the first subject entered for the credential and the program's methodology **must** match.

There are two options available for populating the ***Authorization Code*** field.

Enter the Authorization Code in the ***Authorization Code*** field.

- If there is an exact match to the information entered, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***Authorization Code*** field pick applet to view a pop-up window displaying all Authorization Codes.

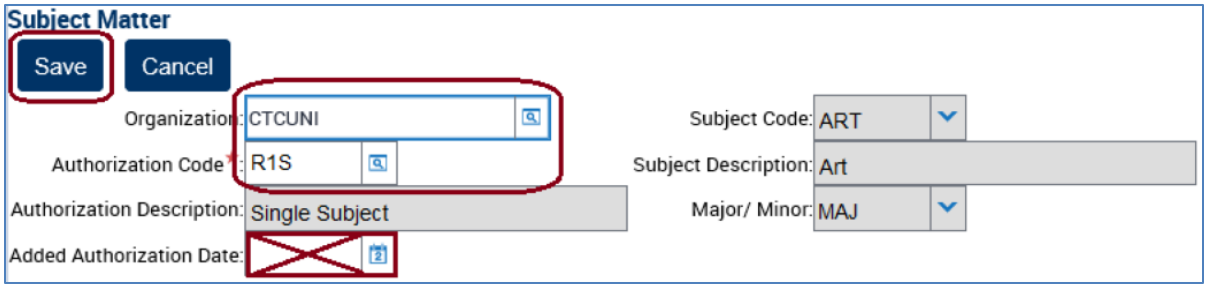
- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct *Authorization Code and Subject Code*.
- Click ***OK*** on the pop-up window to populate the field.

Added Authorization Date field

The **Added Authorization Date** field is left blank unless you are adding an authorization to an existing document.

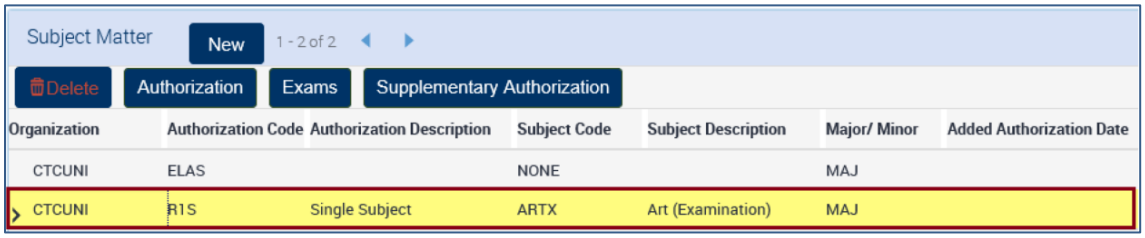
All of the fields for the ***Subject Matter Program*** view are populated.

- Review the information for accuracy.
  - When information in a field is incorrect, click on an editable field and either delete the information or click the pick applet, and repeat the previous steps for entering the correct information.
- Click the ***Save*** button to complete this section.
- Repeat the previous steps for subsequent authorizations as needed.



The *second* section of the document has been successfully created and saved.

The **Subject Matter** section displays the Art (R1S) and pre-populates the English Learner Authorization for Single Subjects (ELAS).



Supplementary Authorization, including Subject Matter Authorizations

Authorizations earned by the completion of specific coursework and semester units or degree major are listed as a minor subject on the document, and are entered using the ***Supplementary Authorization*** button.

Refer to the information below for additional guidance.

TC1 - Single Subject

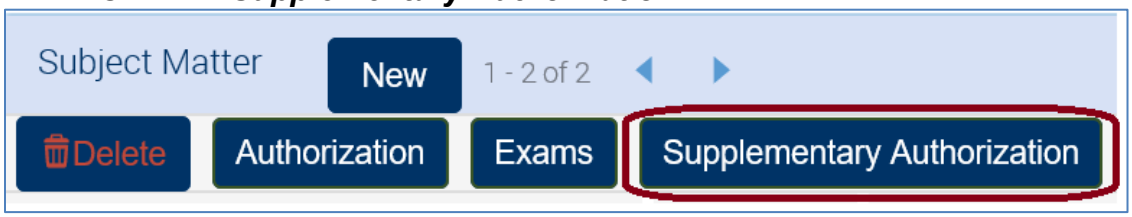
Authorization Code	Type	Leaflet
R1A	Specific Supplemental Authorization	CL-603
R1B	Introductory Supplemental Authorization	CL-603
SMAA	Specific Subject Matter Authorization	CL-852

SMAB	Introductory Subject Matter Authorization	CL-852

TC2 - Multiple Subject

Authorization Code	Type	Leaflet
R2B	Introductory Supplemental Authorization	CL-629
SMAA	Specific Subject Matter Authorization	CL-852
SMAB	Introductory Subject Matter Authorization	CL-852

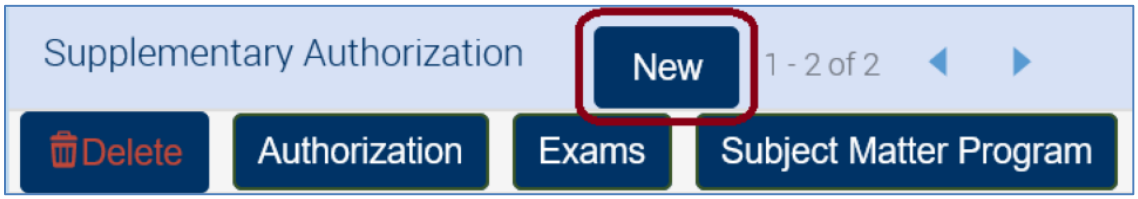
Click the ***Supplementary Authorization*** button.



Supplementary Authorization view

The section title changes to '**Supplementary Authorization**' and a new set of buttons display.

Click the ***New*** button to open the fields.



Authorization Code field

There are two options available for populating the ***Authorization Code*** field.

Enter the **Authorization Code** in the ***Authorization Code*** field.

- If there is an exact match to the information entered, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***Authorization Code*** field pick applet to view a pop-up window displaying all Authorization Codes.

- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct *Authorization Code and Subject*

Description.

- Click ***OK*** on the pop-up window to populate the field.

Added Authorization Date field

The ***Added Authorization Date*** field is left blank unless you are adding an authorization to an existing document.

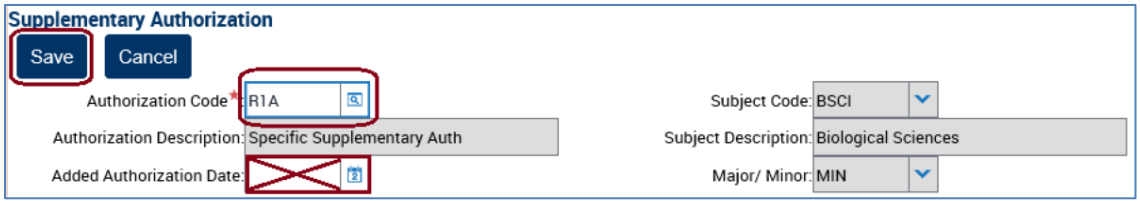
All of the fields for the ***Supplementary Authorization*** view are populated.

Review the information for accuracy.

- When information in a field is incorrect, click on the ***Authorization Code*** field and either delete the information or click the pick applet, and repeat the previous steps for entering the correct information.

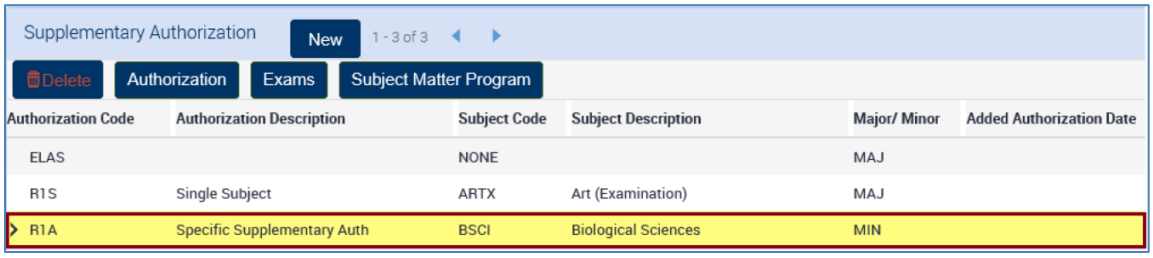
Click ***Save*** to complete this section.

Repeat the previous steps for subsequent authorizations as needed.



The *second* section of the document has been successfully created and saved.

The ***Supplementary Authorization*** section displays Art (R1S), Biological Sciences (R1A) and the pre-populated English Learner Authorization for Single Subjects (ELAS).

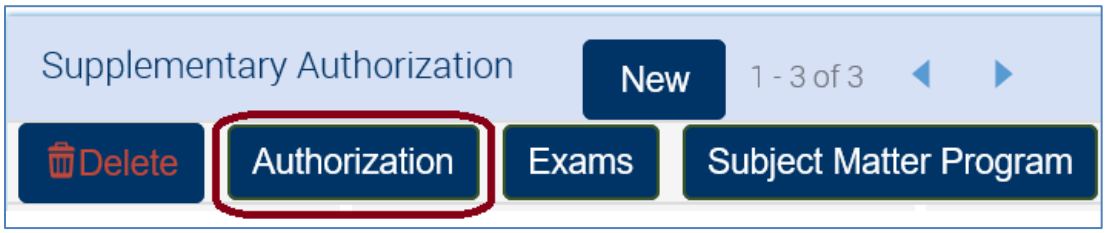


Authorizations/Subjects

The Bilingual authorization(s) earned through a Commission-approved program are listed as a major authorization and are entered using the ***Authorization*** button.

Authorization field

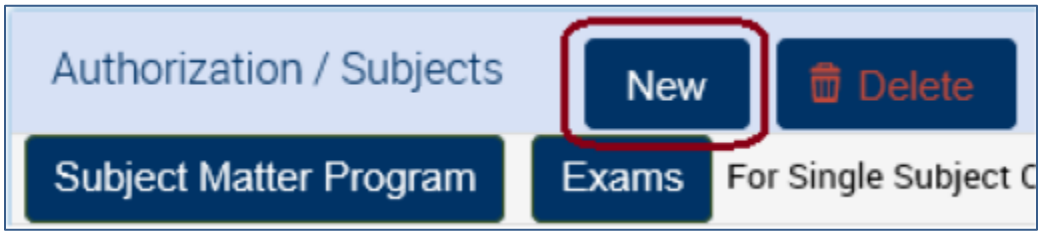
Click the ***Authorization*** button.



Authorization view

The section title changes to '**Authorization/Subjects**' and a new set of buttons display.

Click the ***New*** button to open the fields.



Authorization Code field

There are two options available for populating the ***Authorization Code*** field.

Enter the Authorization Code in the ***Authorization Code*** field.

- If there is an exact match to the information entered, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

The information in this field is case sensitive.

OR

Click the ***Authorization Code*** field pick applet to view a pop-up window displaying all Authorization Codes.

- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct *Authorization Code and Authorization Code Description*.
- Click ***OK*** on the pop-up window to populate the field.

Added Authorization Date field

The **Added Authorization Date** field is left blank unless you are adding an authorization to an existing document.

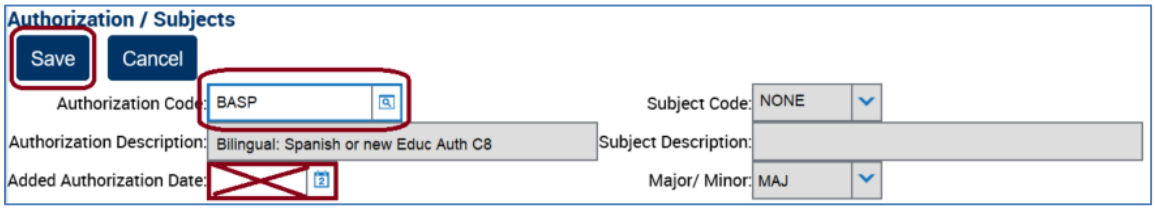
All of the fields for the ***Authorization/Subjects*** view are populated.

Review the information for accuracy.

- When information in a field is incorrect, click on the ***Authorization Code*** field, and either delete the information or click the pick applet, and repeat the previous steps for entering correct information.

Click the ***Save*** button to complete this section.

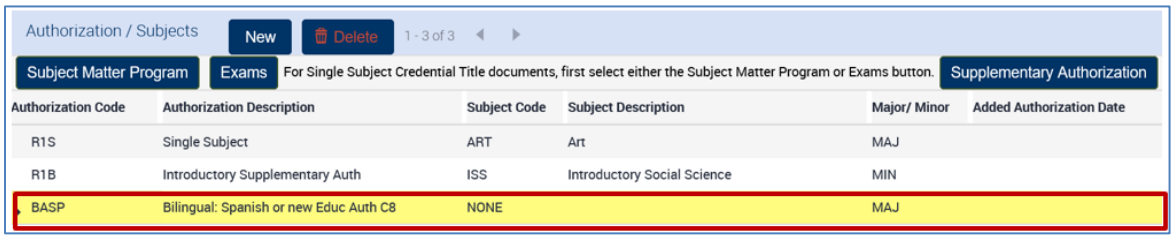
Repeat the previous steps for subsequent Bilingual authorization(s) as needed.



The *second* section of the document has been successfully created and saved.

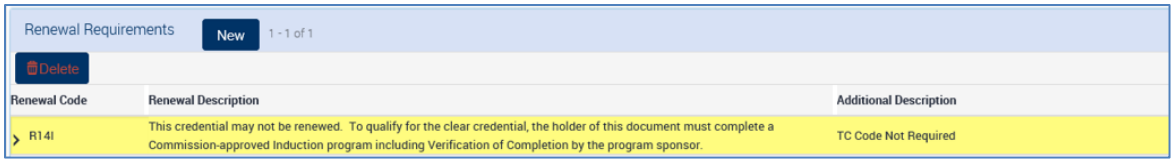
Delete the pre-populated English Learner Authorization (ELA) if entering any Bilingual Authorization (BA).

The ***Authorization/Subjects*** section displays Art (R1S), Introductory Science (R1B) and the Bilingual: Spanish or new Educ Auth C8 (BASP).



The *third* section of the document

The ***Renewal Requirements*** section is pre-populated based on the *Document Title* selected in the *first* section.

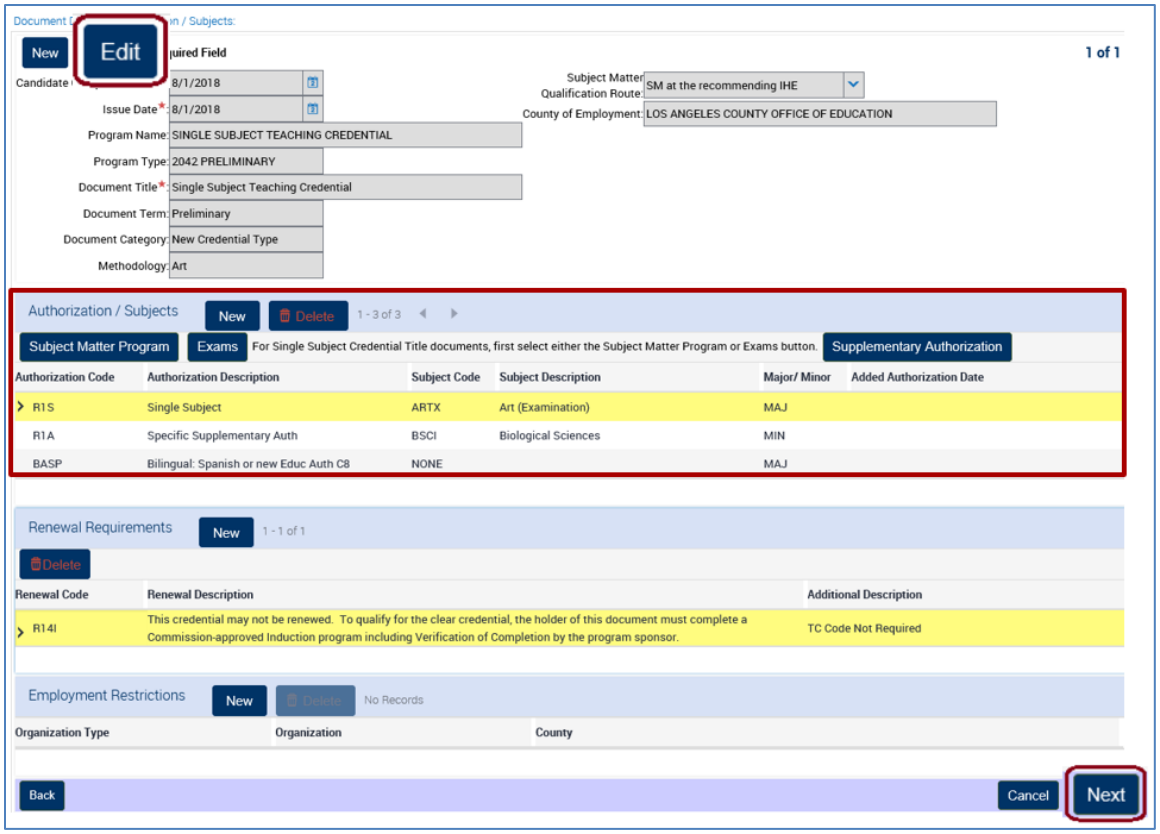


Review the top two sections of the document

Review the information for accuracy.

- Click the ***Edit*** button to open the editable fields in the *first* section of the document if changes are needed.
- Click on the applicable link below to change information displayed on the *second* section of the document:
  - Credential/Program Information (first section)
  - Exams
  - Subject Matter Program
  - Supplementary Authorization, including Subject Matter Authorizations
  - Authorizations/Subjects, English Learner and Bilingual Languages

Continue creating the last part of the document by completing the Employment Restrictions section if the recommendation is for a restricted document, then click ***Next*** to add the required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the document status to **deleted and purged**.

Approved Institutions – Add an Authorization

Credential categories of Added Authorizations (AA) are available based on a Commission-approved authorization program. When a new authorization is added to an *existing* credential, the credential is issued again. When the new authorization(s) is added, the document will display with the same credential title and expiration dates as the *existing* credential.

Review the following documents for additional guidance:

- CIA 14-07 Submission Process for Adding Credential Authorizations

- CIA 14-08 CTC Online Recommendation Guidance
- CTC Online Recommendations - Credential Types and Codes

Determine the Added Authorization Date

The **Added Authorization Date** is based upon the following:

- The date the educator completed the final requirement that qualifies the educator for the additional authorization as determined by the program

The Commission will honor the Added Authorization Date entered by the Authorized Submitter when it is after the date the educator has completed all requirements for the authorization. The date must be no more than 90 days prior to the day it is paid for and received by the Commission.

Add an Authorization to an existing document

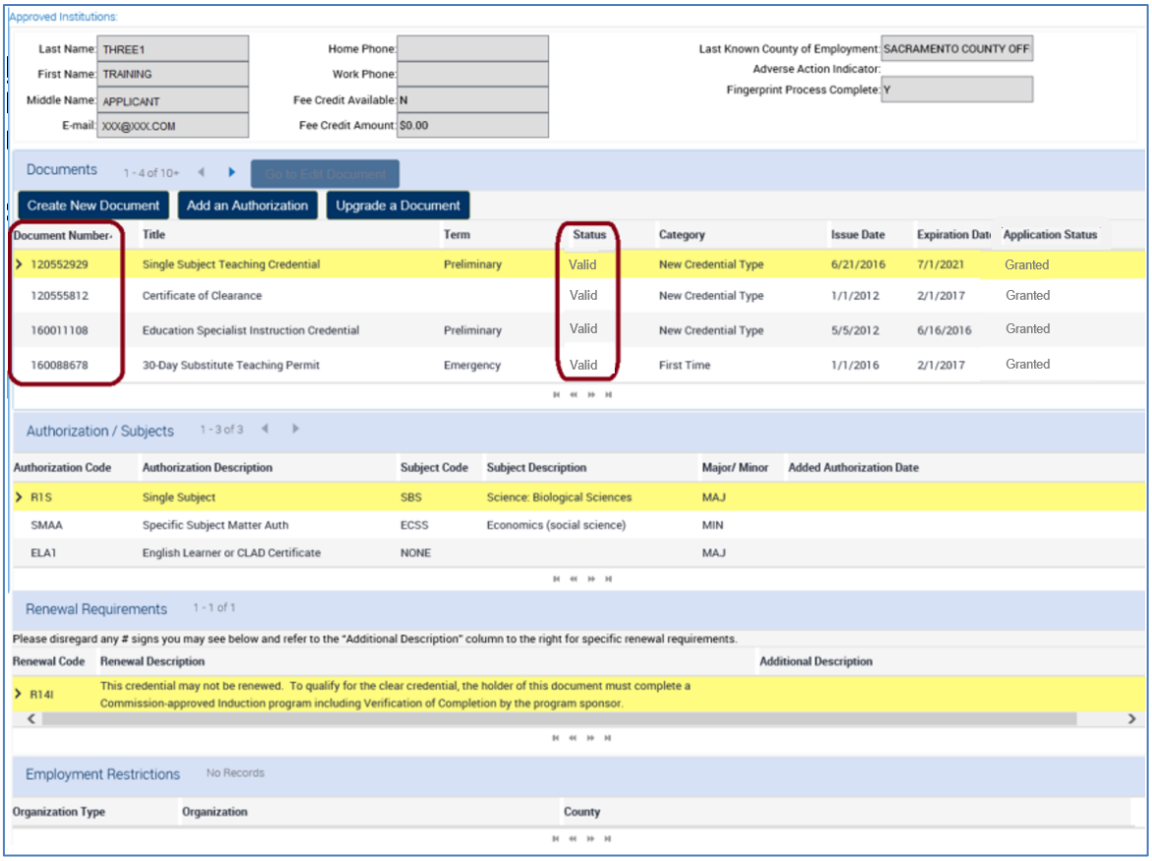
The steps to start an online Recommendation to Add an Authorization are:

- Log into the CTC Online system
  - When the *Welcome Back* view displays, click the *Application* tab
  - If you are logged in, click the *Application* tab
- Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)
- Click ***Recommend***
- Verify the information on the *Educator Information* view and click **Next**
  - If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more information.
  - The ***Create Person*** button is not available on this view.
- Click ***Approved Institutions*** on the *Educator Detail* view

Approved Institutions view

The *Approved Institutions* view is the starting point for creating, editing, deleting and submitting a document recommendation for an educator.

- Review the educator's credential information to select the appropriate document to which the authorization(s) will be added.
  - The document must display the following information:
    - A **Document Number**
    - Status is **Valid**



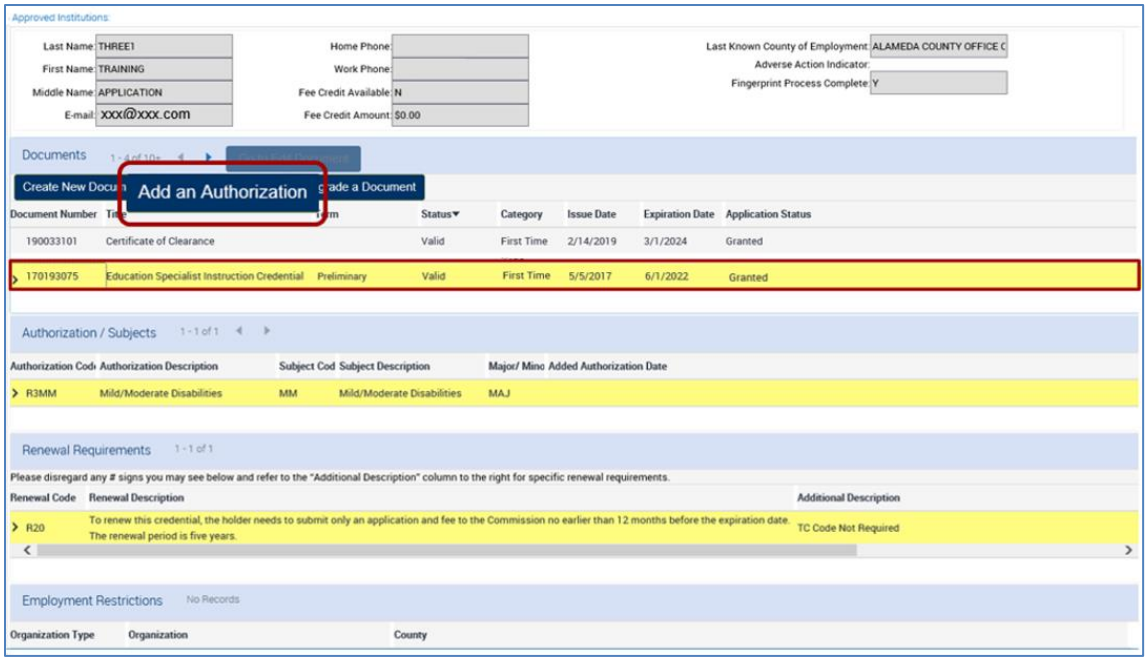
ADD AN AUTHORIZATION

Click on a row of information to select the document.

- Additional information of the highlighted document will display in the sections below.

In the example below, the Education Specialist Added Authorization Area: Autism Spectrum Disorders (AAAS) is added to an issued Clear Education Specialist Instruction document with an effective date of 8/1/2018.

Click the ***Add an Authorization*** button.

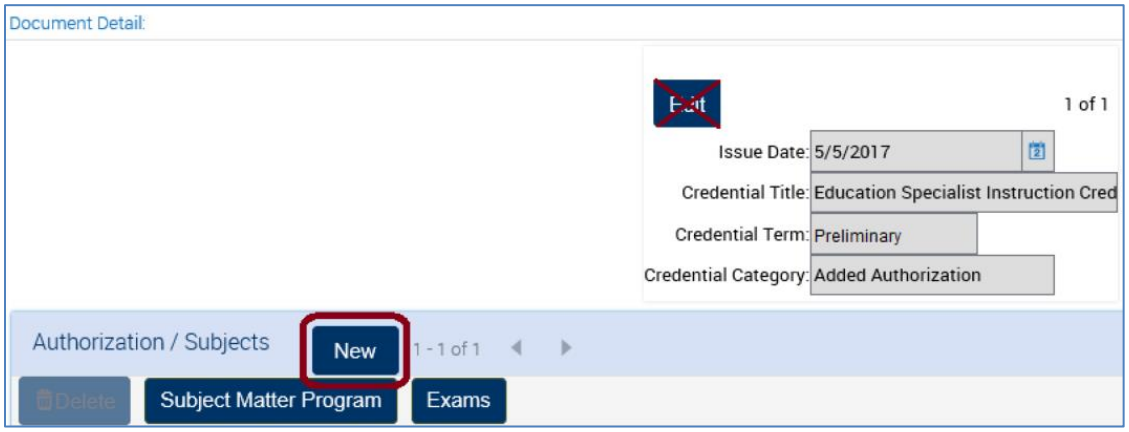


Document Detail view

The section title changes to '**Authorization/Subjects'** and a new set of buttons display.

If needed, click the appropriate button (*Exams* or Subject Matter Program) for the type of authorization to be added.

Click the ***New*** button to open the fields.



Authorization Code field

Enter the Code in the ***Authorization Code*** field.

If you do not know the code, use the pick applet to view available options.

The information in this field is case sensitive.

Added Authorization Date field

Refer to the *Determine the Added Authorization Date* section for additional guidance.

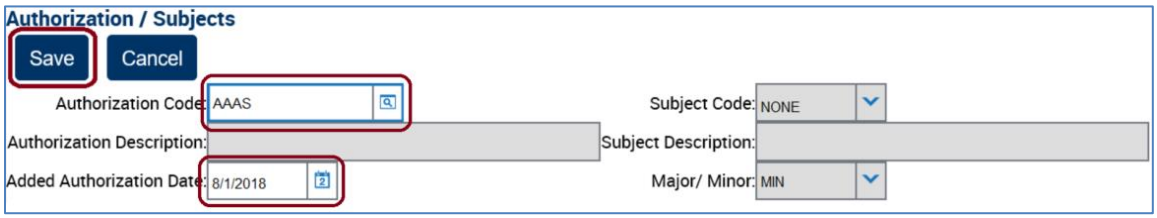
Enter the Date in the ***Added Authorization Date*** field.

All of the fields for the ***Document Detail - Authorization/Subjects*** view are populated.

Review the information for accuracy.

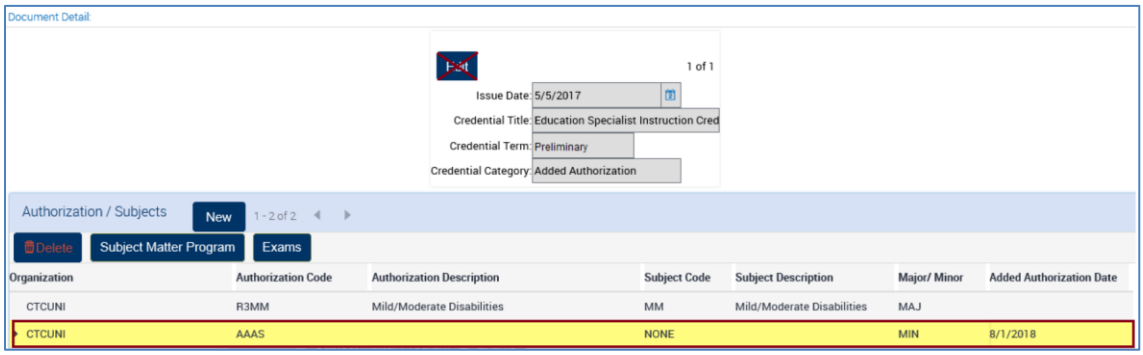
- When information in a field is incorrect, click on an *editable* field and either delete the information or click the pick/date applet, and repeat the previous steps for entering correct information.

Click ***Save*** to complete this section.



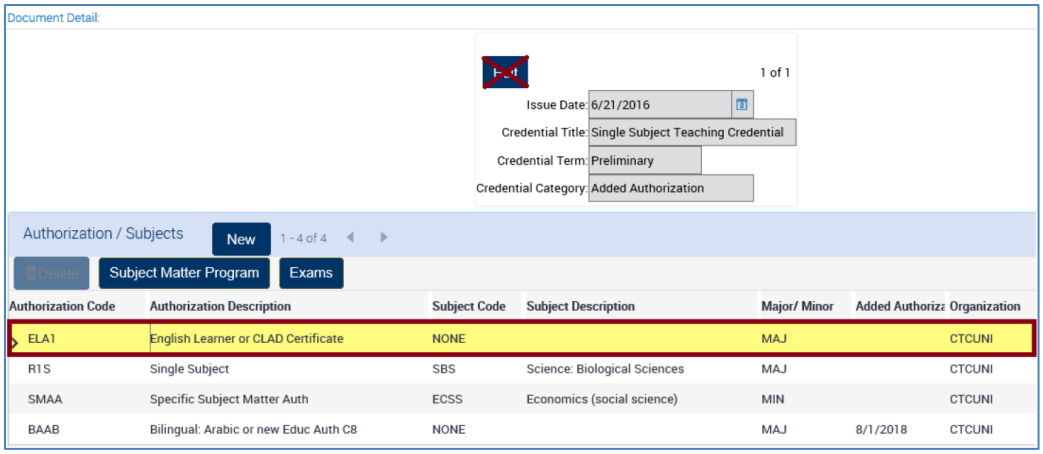
The *second* section of the document has been successfully created and saved.

The ***Authorization/Subjects*** section displays the Education Specialist Added Authorization Area: Autism Spectrum Disorders (AAAS) and an added authorization date of 8/1/2018.



ADDING BILINGUAL AUTHORIZATION(S)

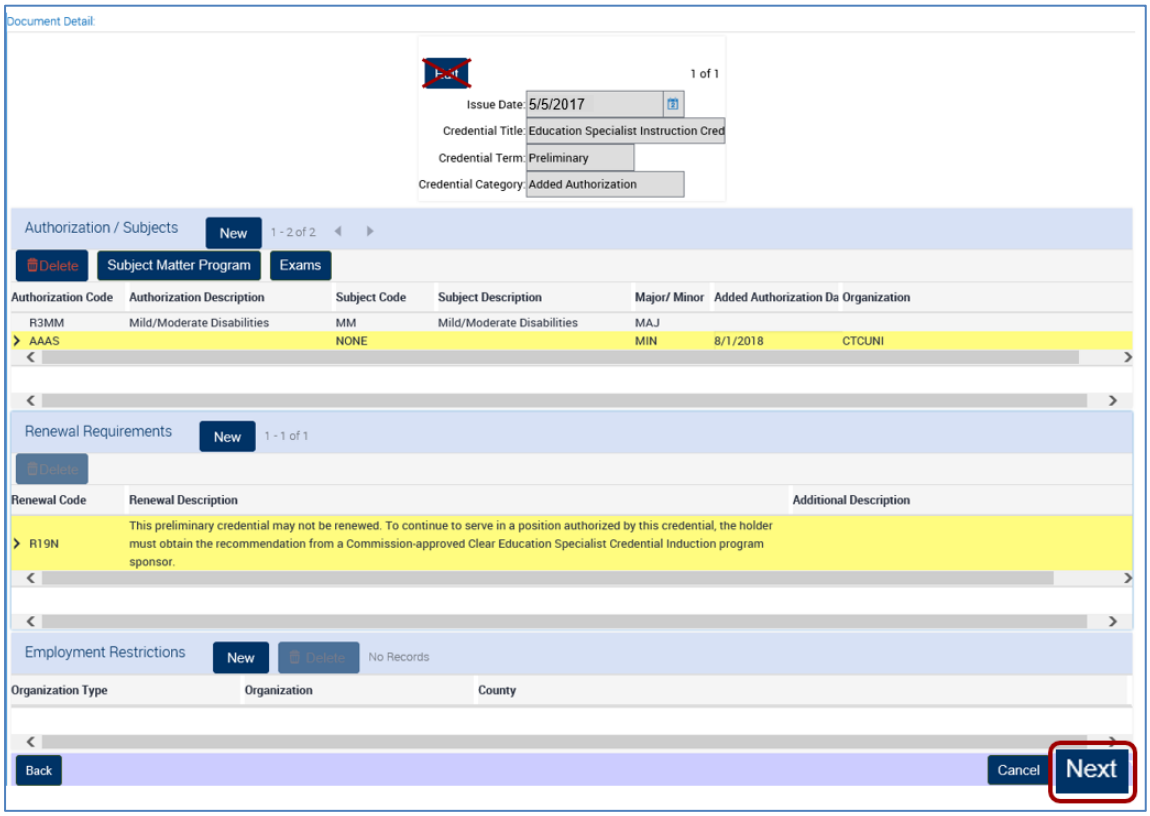
When adding Bilingual authorization(s) to an existing document Commission staff will remove the previous English Learner authorization. If this is not done, email a correction request to remove the pre-populated English Learner authorization. Go to the Agency Users - Corrections section for additional information.



The *third* section of the document.

Renewal codes are not entered when adding authorizations to an existing document. The ***Renewal Requirements*** section will not change.

Finish submitting the document by clicking ***Next*** to add the required Attachments.



From this view:

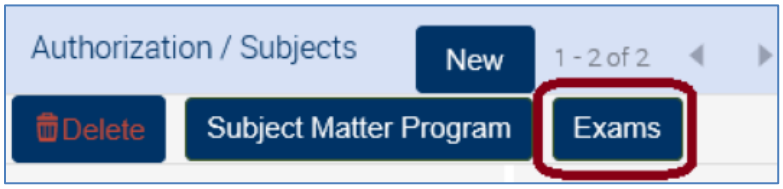
- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.

- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the status to **deleted and purged**.

ADD AN AUTHORIZATION BY EXAMINATION

Authorizations earned by passage of an examination are entered using the **Exams** button.

Click the ***Exams*** button.



Document Detail - Exams view

The section title changes to **'Exams'** and a new set of buttons display.

Click the ***New*** button to open the fields.

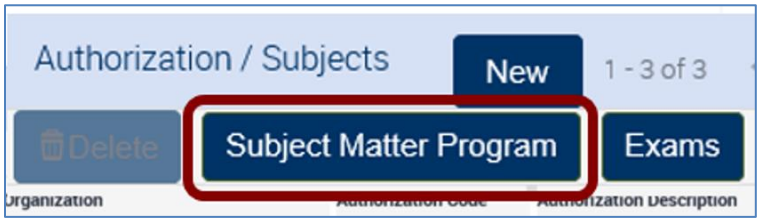


Follow the basic steps outlined in the *Add an Authorization Code field* section to enter the new authorization earned by examination.

ADD AN AUTHORIZATION BY SUBJECT MATTER PROGRAM

Authorizations earned through a Commission-approved Subject Matter Program are entered using the Subject Matter Program button.

Click the ***Subject Matter Program*** button.



Document Detail - Subject Matter Program view

The section title changes to '**Subject Matter Program'** and a new set of buttons display.

Click the ***New*** button to open the fields.



Change the ***Organization*** field to reflect the Organization where the Subject Matter Program was competed.

Follow the basic steps outlined in the *Add an Authorization Code field* section to enter the new authorization earned by Subject Matter Program.

Approved Institutions – Upgrade A Document

Credential categories of **Clear** or **Level II** Renewal (**RN**) or Reissuance (**RI**) are available for selection based on a Commission-approved preparation program.

Click on one of the links below for additional guidance:

- ~~CTC Online Alert: 12-03 - Recommending for a Clear or Level II credential~~
- CIA 14-08 CTC Online Recommendation Guidance
- CIA 16-02 English Learner Authorization for Holders of Preliminary Teaching Credentials (including Level I/Preliminary Education Specialist Instruction Credentials
- CIA 17-01 Dependent Credential Dating
- CTC Online Recommendations - Credential Types and Codes

Upgrade an existing document

The steps to start an online Recommendation to Upgrade a Document are:

Log into the CTC Online system

- When the *Welcome Back* view displays, click the *Application* tab
- If you are logged in, click the *Application* tab

Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)

Click ***Recommend***

Verify the information on the *Educator Information* view and click **Next**

- If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more

information.

- The ***Create Person*** button is not available on this view.

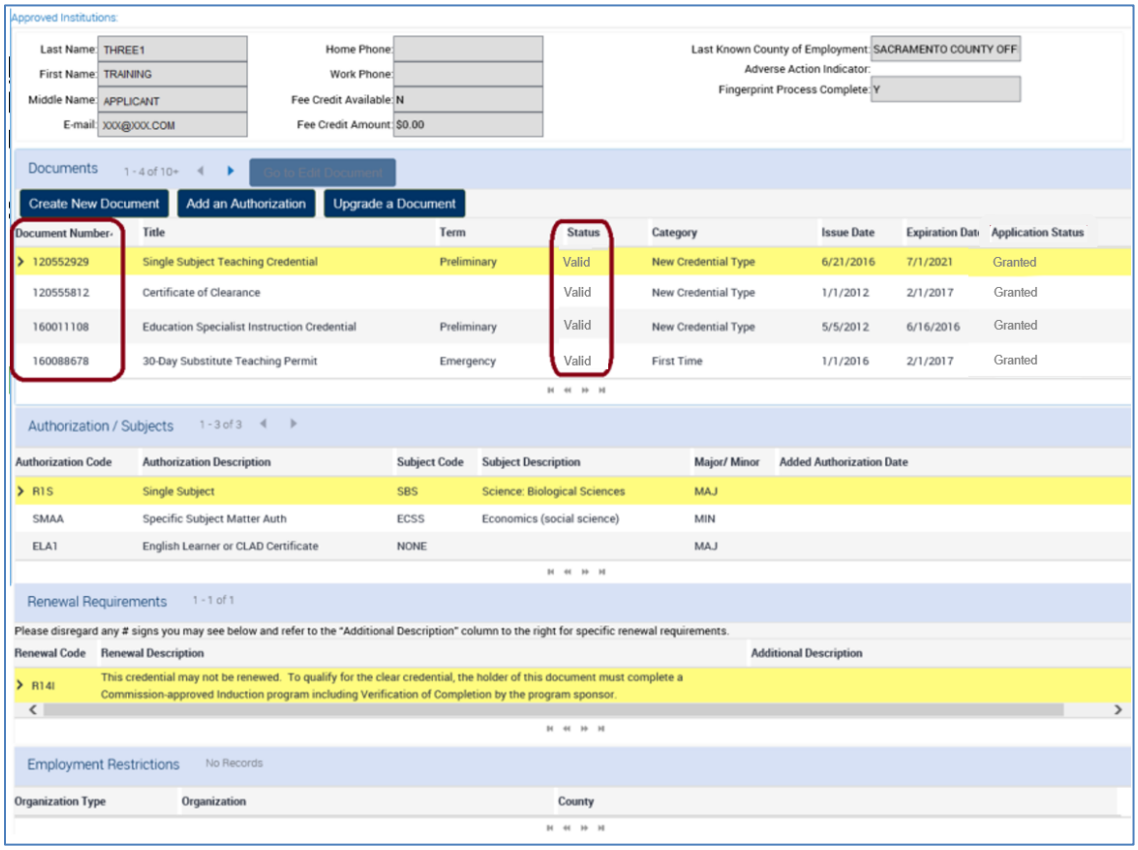
Click ***Approved Institutions*** on the *Educator Detail* view

Approved Institutions view

The *Approved Institutions* view is the starting point for creating, editing, deleting and submitting a document recommendation for an educator.

Review the educator's credential information to select the most recent Level I or Preliminary document to upgrade.

- The document must display the following information:
  - A Document Number
  - Status is **Valid**



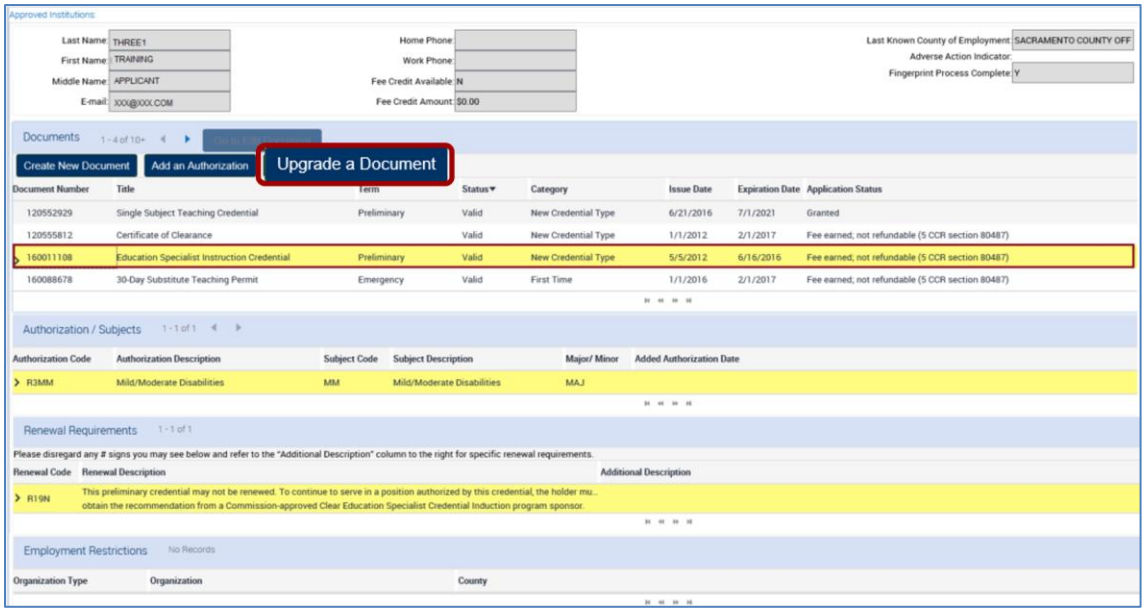
UPGRADE A DOCUMENT

Click on a row of information to select the document.

- Additional information of the highlighted document will display in the sections below.

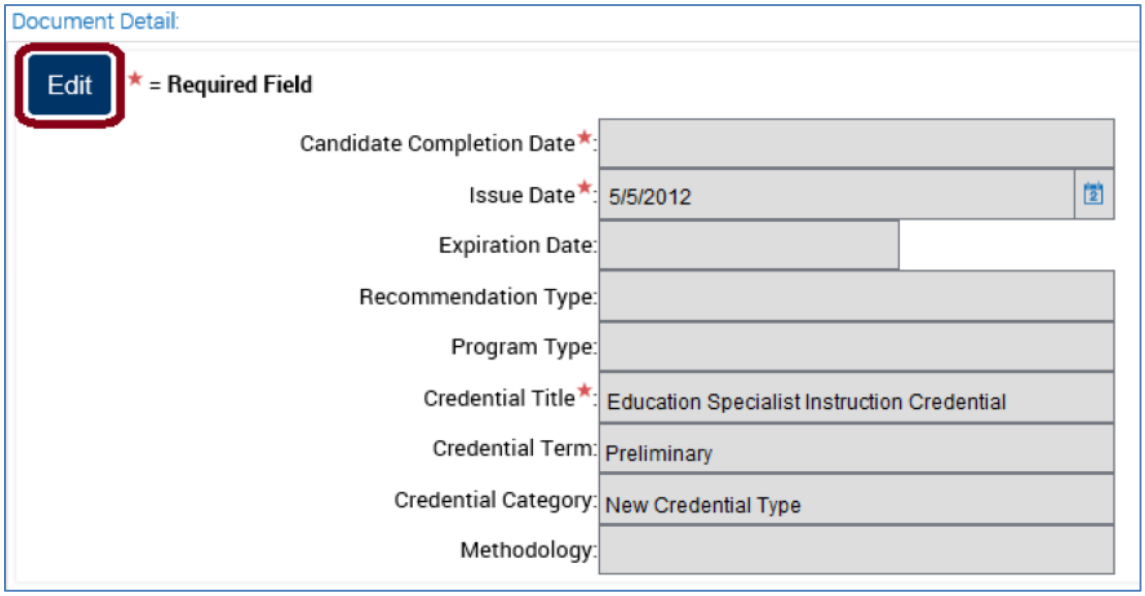
In the example below, the Preliminary Education Specialist Instruction document is selected to upgrade to a Clear Education Specialist Instruction document with an effective date of 8/1/2018.

Click ***Upgrade A Document***.



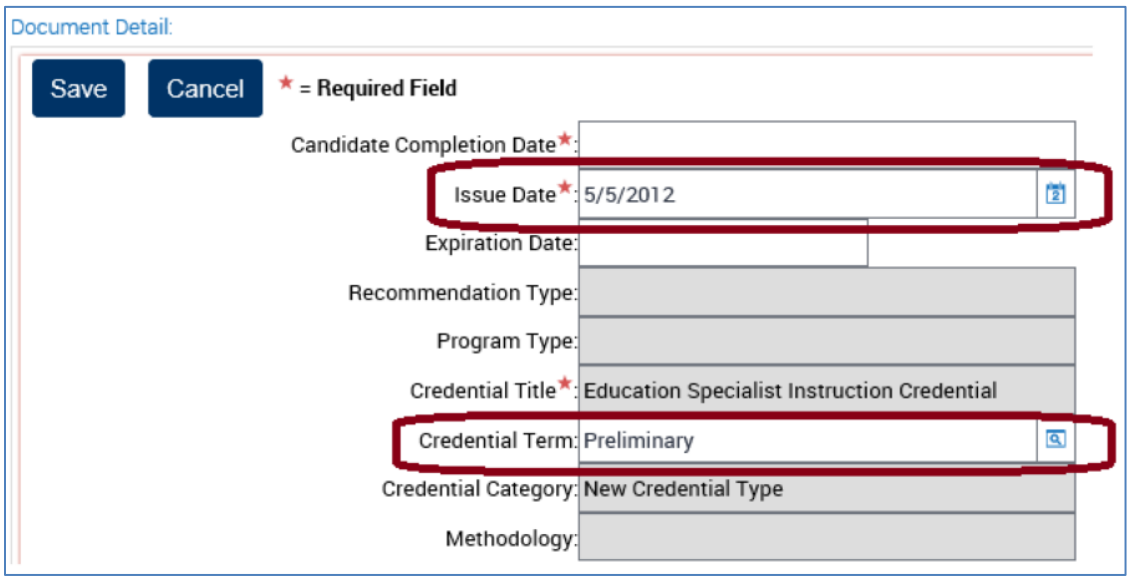
Document Detail view

Click ***Edit*** to open the fields in the ***first*** section.



Starting from the top, click in each of the opened fields to delete the existing

information.



Candidate Completion, Issue and Expiration Dates

Candidate Completion Date field

This is the date the educator completed the final requirement that qualifies the educator for the document as determined by the program.

The Candidate Completion Date will then filter out programs on the Credential Title list based on the Program Standard Approved Date and the Final Completion Date. The Candidate Completion Date will also check whether the candidate completed the authorization program within the organization's approval time frame.

Determine the Issue Date

This issue date is based upon the following:

- the completion date of Clear or Level II program as determined by the program if the educator is eligible and has meet all the requirements for the document on the date

The Commission will honor the issuance date entered by the Authorized Submitter when it is after the date the educator has completed all requirements for the document. The date must be no more than 90 days prior to the day it is paid for and received by the Commission.

Determine the Expiration Date

Regardless of the document category selected (RN or RI), an upgraded document will expire the first day of the following month five years from the issuance date.

Issuance date for Upgraded document: 8/01/2018
Expiration date for Upgraded document 9/01/2023

Dependent Credential Dating

Dependent documents, such as the Administrative Services Credential, are an exception to the dating rule. It is critical to review the guidance in CIA 17-01 Dependent Credential Dating to avoid costly errors when submitting dependent documents.

Date fields

- Enter the date the educator completed the program in the ***Candidate Completion Date*** field.
- Enter the document's effective date in the ***Issue Date*** field.
- Enter the document's expiration date in the ***Expiration Date*** field.

There are two options available for entering a date in the ***Date*** fields.

- Enter the date with the (MM/DD/YYYY) format to populate the field.

OR

- Click the ***Date*** field calendar icon, select the month and year then click on a date.
  - Click ***DONE*** to populate the field.

Credential (Document) Term *field*

Select the Credential Term for the document. If the document title is not listed, please go to the Technical Requirements, Requesting CTC Technical Assistance section for information on how to contact the Commission.

There are two options available for populating the ***Credential Term*** field.

- Enter the Credential Term in the ***Credential Term*** field.
  - If there is an *exact* match to the information entered, the field will populate.
  - If there is more than one match or there is *not* an exact match, a pop-up window will display.

OR

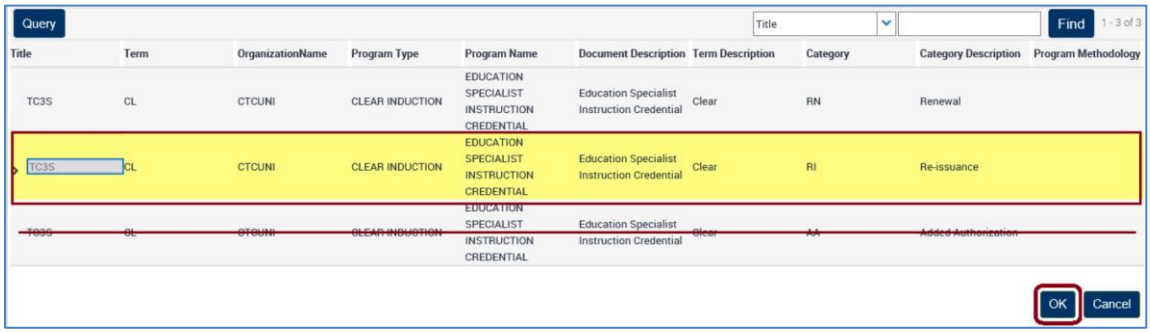
- Click the ***Credential Term*** field pick applet to view a pop-up window displaying all Credential Terms.
  - Click the ***Find*** button and/or arrows on the pop-up window to view the

available information.

- Click on the row with the correct ***Document Description and Category Description***.
- Click ***OK*** to populate the field.

To view all of the information in the pop-up window, move the mouse pointer over the side of the window to change it to a double arrow pointer. Click on the double arrow and move it to expand or reduce the window size.

In the example below, the *credential category* of ***Re-issuance*** is selected as the educator's *expired* preliminary credential is recommended for an upgrade to a clear credential.

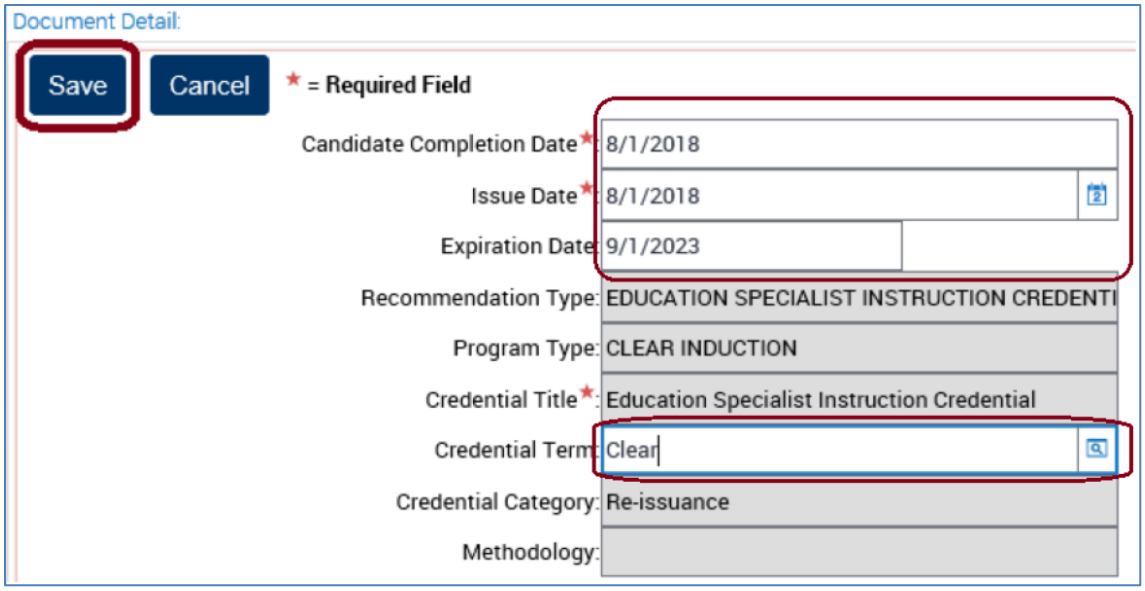


All of the fields for the ***Document Detail*** view are populated.

Review the information for accuracy.

- When information in a field is incorrect, click on an editable field, and either delete the information or click the pick applet, and repeat the previous steps for entering correct information.

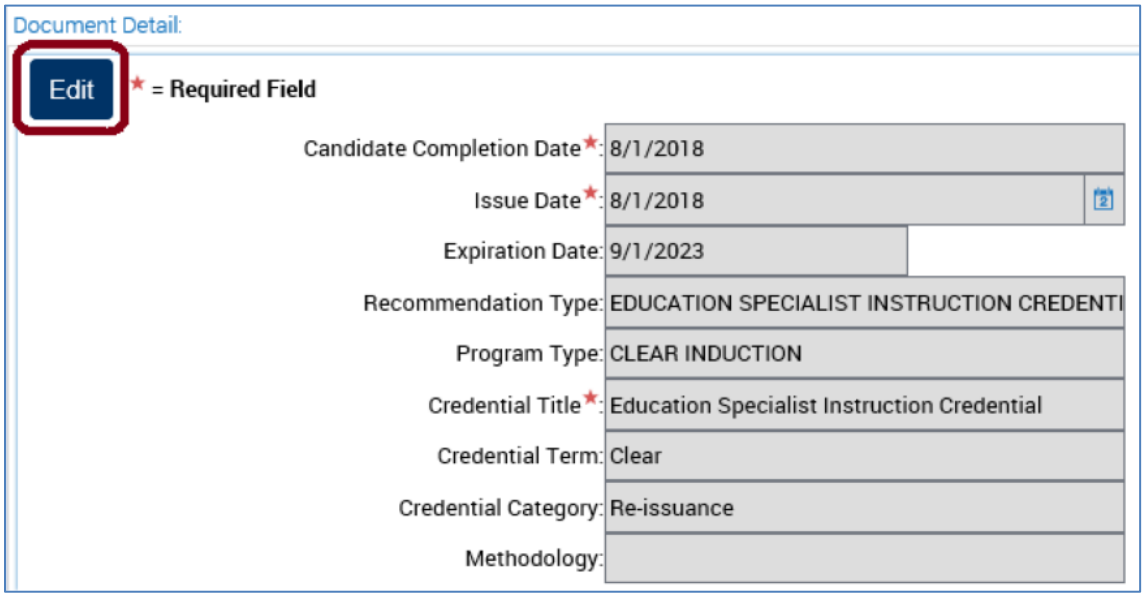
Click the ***Save*** button to complete this section.



The *first* section of the document has been successfully created and saved.

The ***Document Detail – Authorization/Subjects*** section displays a Re-Issued Clear Education Specialist Instruction Credential with an issue date of 8/1/2018 and expiration date of 9/1/2023.

When information in a field is incorrect, click the ***Edit*** button to open the editable fields.



***Authorizations/Subjects* section**

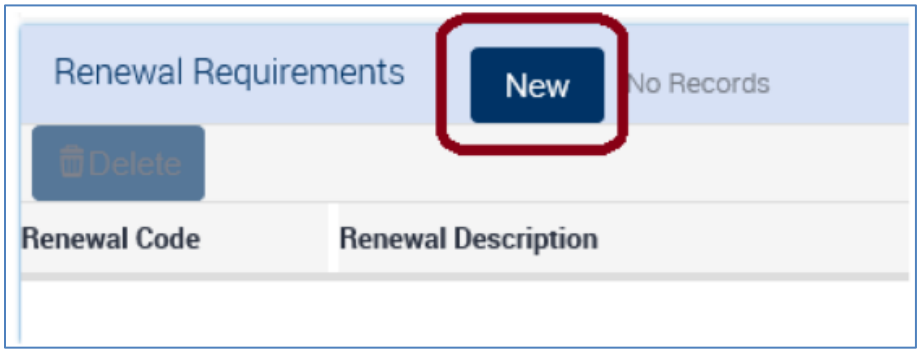
Additional Authorizations/Subjects **cannot** be added when upgrading a document through the CTC Online system.

Additional authorizations may be applied for after the Clear Credential recommendation has been granted and will require an additional application and fee.

Renewal Requirements section

The Renewal Requirements section is blank. Add the *new* renewal requirements.

Click the ***New*** button to open the fields.



Renewal Code field

There are two options available for populating the ***Renewal Code*** field.

Enter the Code in the ***Renewal Code*** field.

The information in this field is case sensitive.

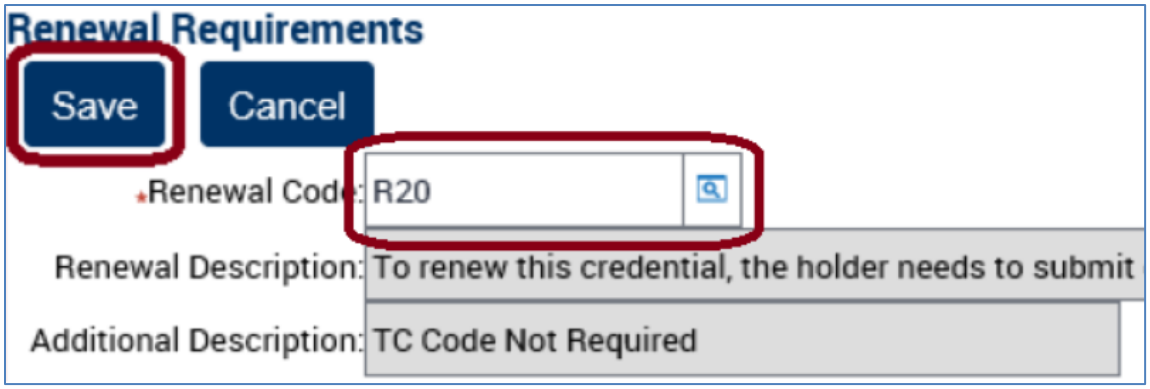
- If there is an exact match to the information entered, the field will populate.
- If there is more than one match or there is not an exact match, a pop-up window will display.

OR

Click the ***Renewal Code*** field pick applet to view a pop-up window displaying available Codes.

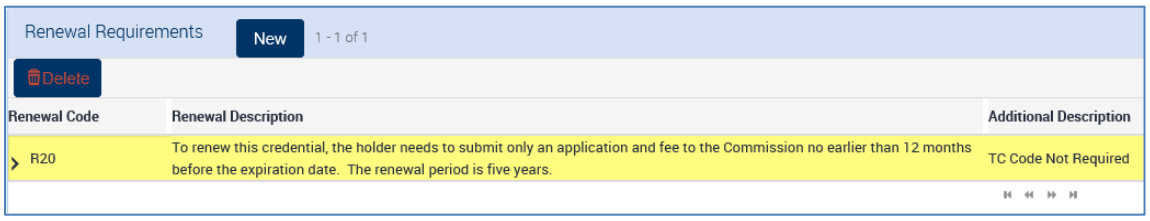
- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct *Renewal Code*.
- Click ***OK*** on the pop-up window to populate the field.

Click ***Save*** to complete this section.



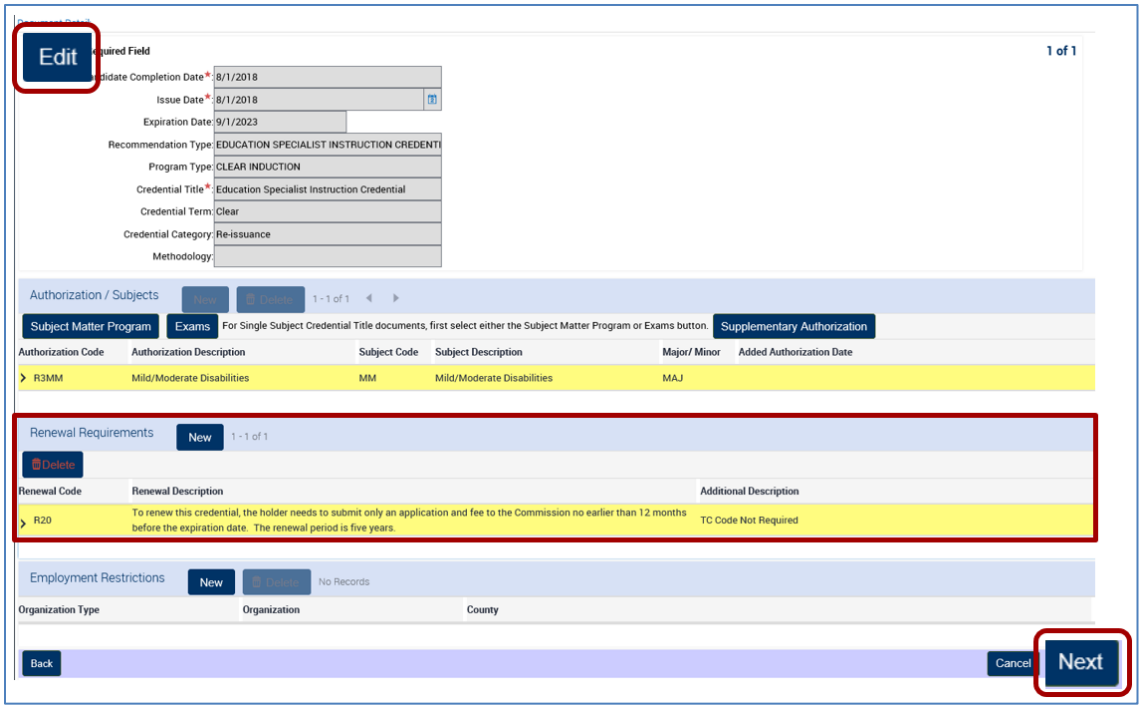
The *third* section of the document has been successfully created and saved.

The ***Renewal Requirements*** section displays the updated Renewal Requirement R20.



Review the top three sections of the document

- Review the information for accuracy.
  - Click the ***Edit*** button to open the editable fields in the *first* and *second* sections of the document if changes are needed.
  - To change information displayed on the *third* section of the document, click on a row and then click the ***Delete*** button. Click the ***New*** button to open the editable fields.
- Finish submitting the document by clicking ***Next*** to add any required Attachments.



From this view:

- Click the *Application tab* to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the status to **deleted and purged**.

Approved Institutions – Go to Edit Document

The ***Edit*** or ***Go To Edit Document*** button becomes available for selection when an Authorized Submitter selects a document created by the educator and has one the following status:

- In Progress
- Recommended
- Awaiting Payment
- Educator Return
- Ready for Submission

When the application displays the status of "**Pending**", the educator has already completed the application and payment process and the document has been received

by the Commission. The document status also displays on the *Educator Detail* view.

- Click the ***Edit*** button when using the *My Filtered Recommends* view.
- Click the ***Go to Edit Document*** button when using the *Approved Institutions* view

My Filtered Recommends view – Edit

The steps to edit a document using the ***Edit*** button are:

Log into the CTC Online system

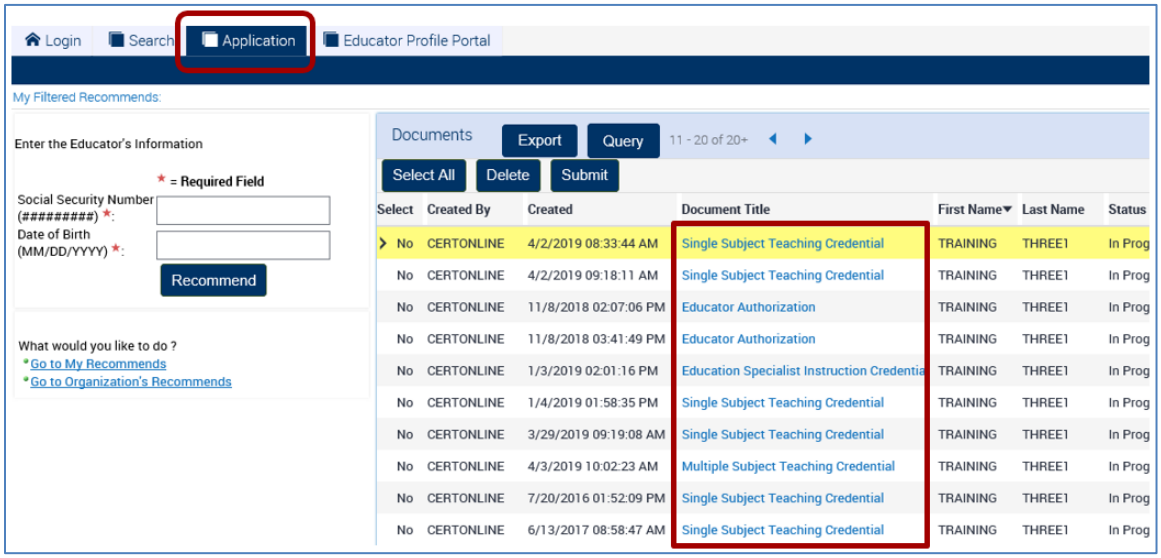
- When the *Welcome Back* view displays, click the *Application* tab
- If you are logged in, click the *Application* tab

My Filtered Recommends view

Click on the ***Document Title***.

Use the arrows or the ***Query*** button to locate the document.

When the document you wish to edit does not display on this view, it may have been deleted. Re-create the document following the steps outlined in the Create New Document section.



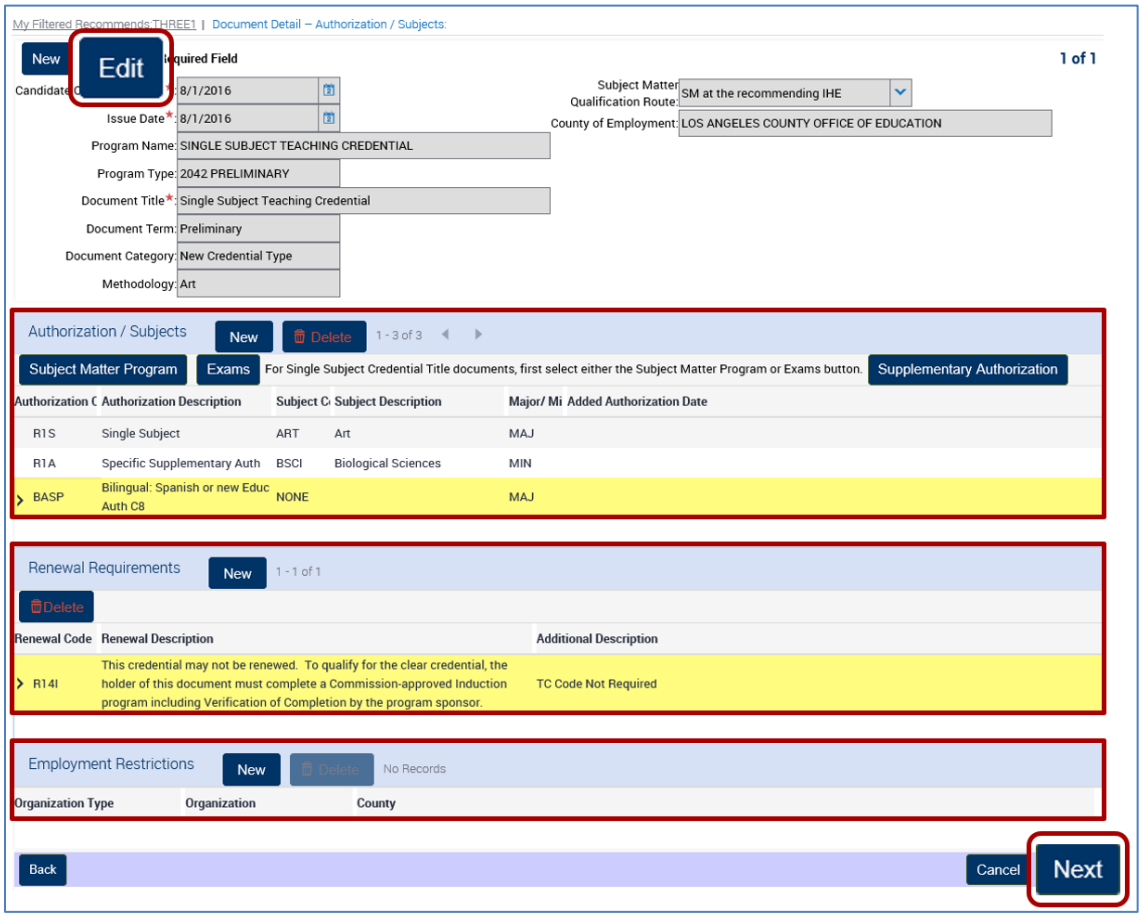
Document Details-Authorizations/Subjects view

Review all of the information displayed on this view.

- Click ***Edit*** to open the editable fields in the *first* section if changes are necessary. Delete the information in the editable fields and repeat the steps for entering the correct information in the fields.
- Click the appropriate button (Exams, Subject Matter Program or Authorization) in the *second* section if changes are necessary.
- Click ***Edit*** to open the editable fields in the *third* section if changes are needed and you entered the Renewal Code. Delete the incorrect Renewal Code.
- Click ***Edit*** to open the editable fields in the *fourth* section if changes are needed and you entered the Employment Restrictions. Delete the incorrect Employment Restrictions.

Go to the Upgrade A Document section for information on how to make changes to a **Clear** or **Level II** document.

Finish submitting the document by clicking ***Next*** to add the required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In**

Progress" and return to the *My Filtered Recommendations* view.

- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button is not active on this view.

Approved Institutions view – Go to Edit Document

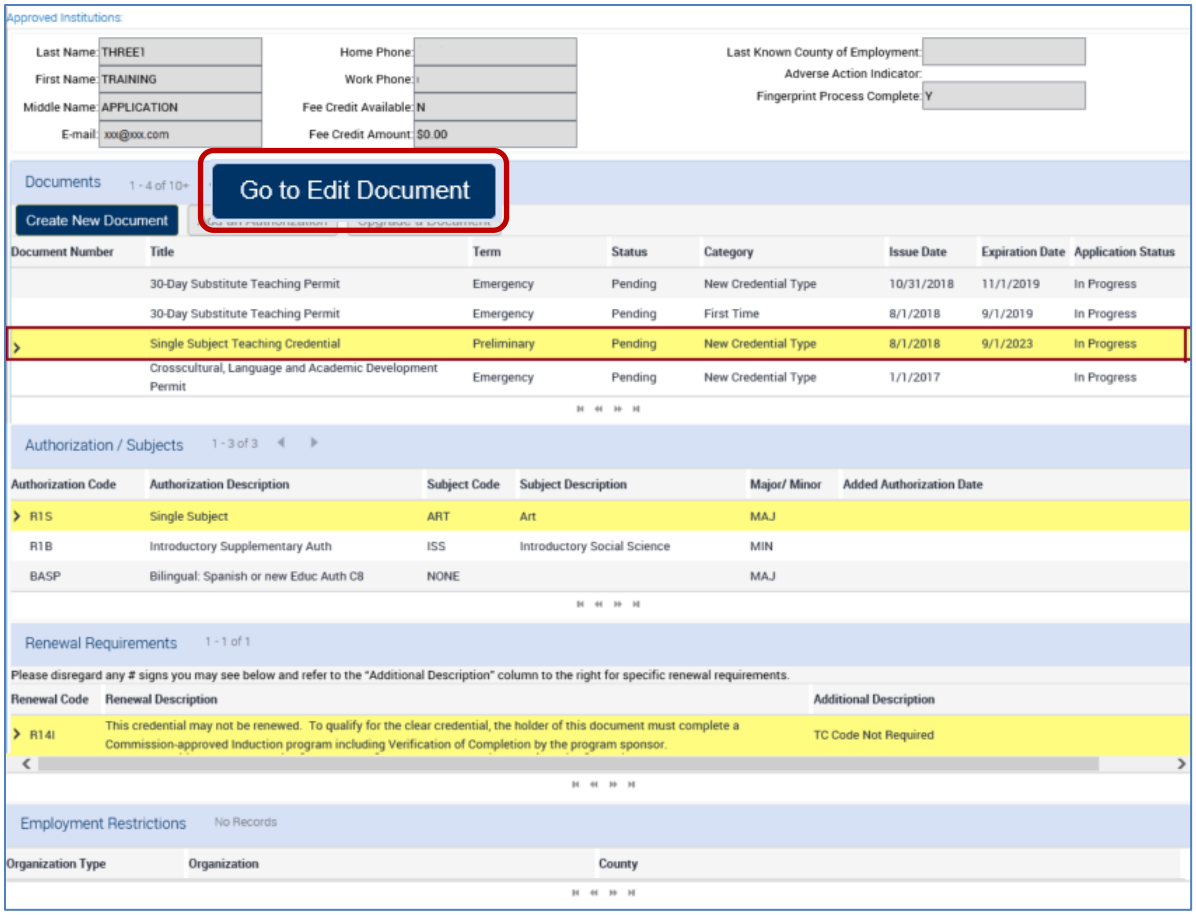
The steps to edit a document using the ***Go to Edit*** button are:

- Log into the CTC Online system
  - When the *Welcome Back* view displays, click the *Application* tab
  - If you are logged in, click the *Application* tab
- Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)
- Click ***Recommend***
- Verify the information on the *Educator Information* view and click **Next**
  - If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more information.
  - The ***Create Person*** button is not available on this view.
- Click ***Approved Institutions*** on the *Educator Detail* view

Approved Institutions view

- Click on a row of information (document). Additional information of the highlighted document will display in the sections below.
- Click the ***Go to Edit Document*** button to open the *Document Detail* view of the highlighted row.

  When the document you wish to edit does not display on this view, it may have been deleted. Click ***Create New Document*** to re-create the document.



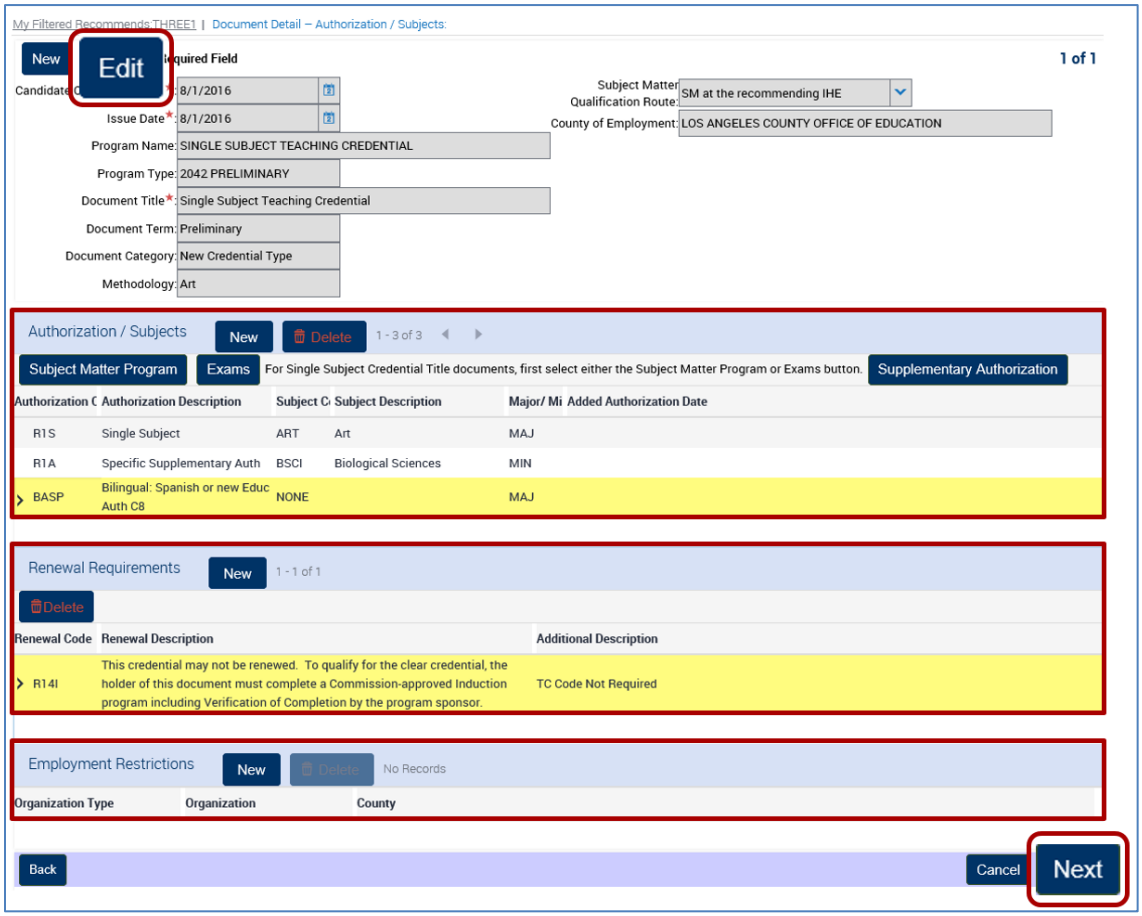
Document Details-Authorizations/Subjects view

Review all of the information displayed on this view.

- Click ***Edit*** to open the editable fields in the *first* section if changes are necessary. Delete the information in the editable fields and repeat the steps for entering the correct information in the fields.
- Click the appropriate button (Exams, Subject Matter Program or Authorization) in the *second* section if changes are necessary.
- Click ***Edit*** to open the editable fields in the *third* section if changes are needed and you entered the Renewal Code. Delete the incorrect Renewal Code.
- Click ***Edit*** to open the editable fields in the *fourth* section if changes are needed and you entered the Employment Restrictions. Delete the incorrect Employment Restrictions.

Go to the Upgrade A Document section for information on how to make changes to a **Clear** or **Level II** document.

Finish submitting the document by clicking ***Next*** to add any required Attachments.



From this view:

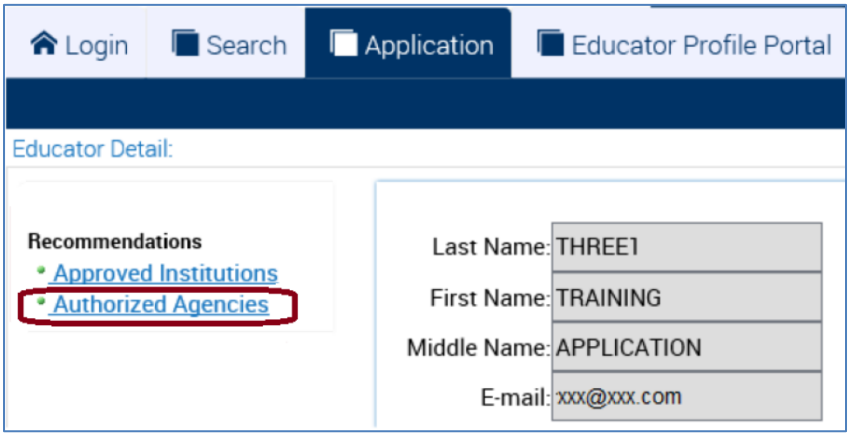
- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button is not active on this view.

Authorized Agencies

The steps to start an online Recommendation which is not the result of completing a Commission-approved preparation or subject matter program:

- Log into the CTC Online system
  - When the *Welcome Back* view displays, click the *Application* tab
  - If you are logged in, click the *Application* tab

- Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)
- Click ***Recommend***
- If appropriate, re-enter the Educator's **SSN** and **DOB** to create the online profile
  - Click ***Recommend***
- Enter or verify the information on the *Educator Information* view
  - If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more information.
- Click ***Next***
- Click ***Authorized Agencies***



Authorized Agencies view

This is the starting point for creating, editing, deleting and submitting a document recommendation that is not part of a commission-approved program.

Review the educator's documents displayed on this view to determine the credential type, base document, expiration dates, or other information which is applicable for the new document.

The information displayed on this view is provided in a read-only view and is for verification purposes only.

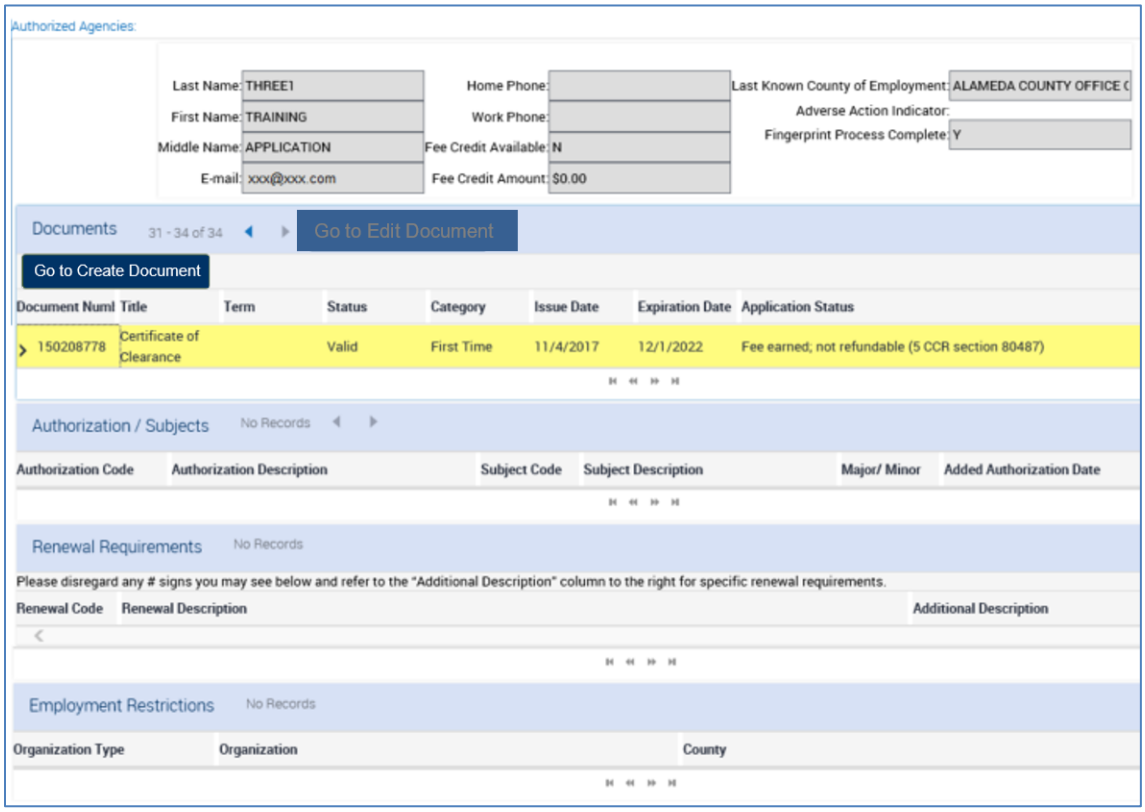
Only documents with a **Document Number** and an Application Status of **Valid** have been issued to the Educator.

Click on a **Document Number** to highlight the row and view the document's details.

When you are ready to start the recommendation process, click on the appropriate recommendation option. The following recommendation options may

be available on this view:

Go to Create Document Go to Edit Document



Authorized Agencies - Resources

The CTC Online – Processing Recommendations section of the Credential Information Guide provides additional information and guidance to employers in electronically submitting applications for credential recommendations:

From this view:

- The *Go to Create Document* link is for creating first time or new type documents based submitted by employing agencies. This button is always active.
- The *Go to Edit Document* link is for editing details of a document created by the Authorized Submitter and is active when a document does not have the status of "**Application to be deleted and purged**" or the application and payment has not yet been submitted by the educator to the Commission.

Authorized Agencies - Create New Document

Document categories that do not require a recommendation from a Commission-approved program are available under this option. These documents are only submitted by employing agencies.

This section describes the process for creating a recommendation for the following credential:

- Emergency 30-Day Substitute Teaching Permit (FT)

Authorized Agencies view

The *Authorized Agencies* view is the starting point for creating, editing, deleting and submitting a credential recommendation for an educator.

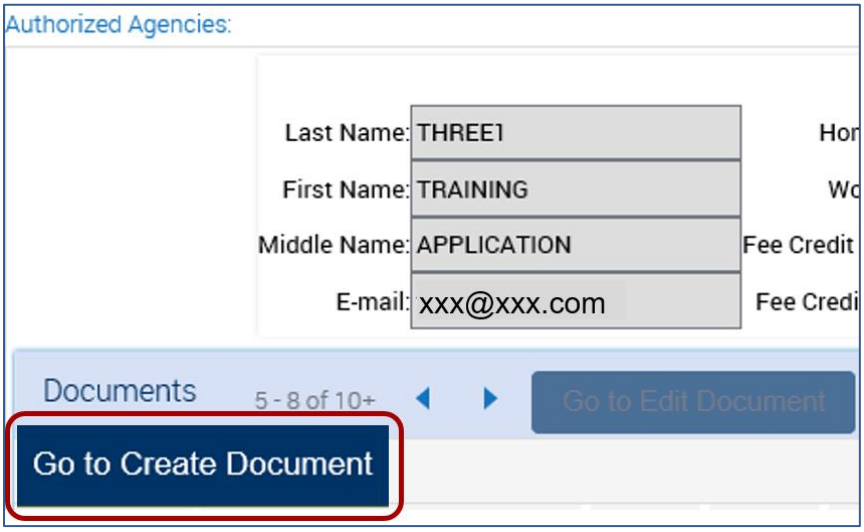
Review the educator's document information

Review the educator's document information to verify the recommendation is appropriate and the new document's category.

Create the *first* section of the document

From the *Authorized Agencies* view, the ***Go to Create Document*** button will open the *Document Detail* view.

Click ***Go to Create Document***.

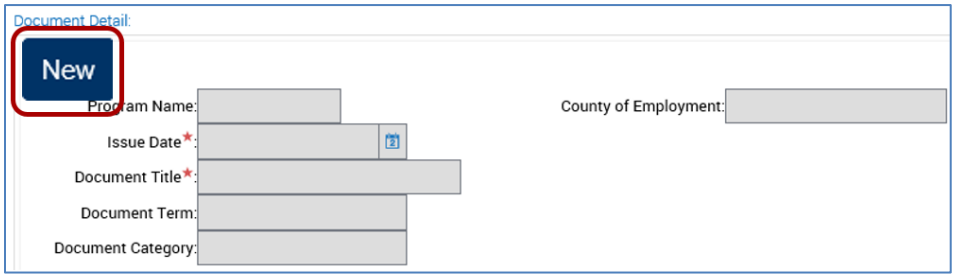


Document Detail view

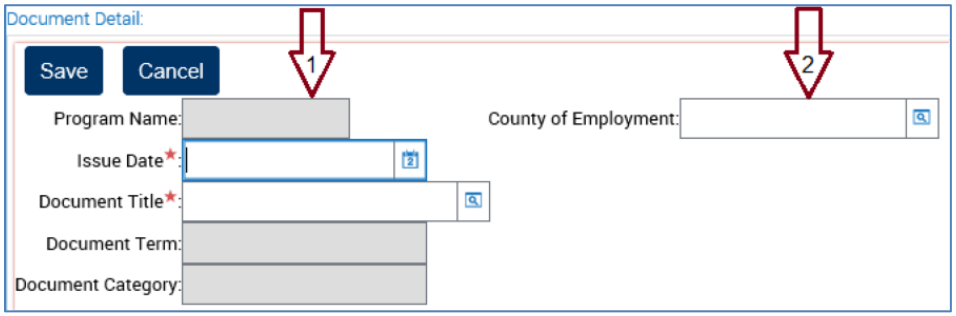
Required fields are marked with an asterisk * symbol.

Create the Document

Click the ***New*** button to open the fields.



Enter the information moving from the left top to bottom, then the right top.



Determine the Issue Date

This issue date is based upon the following:

- the date the educator completed the final requirement that qualifies the educator for the document

The Commission will honor the issuance date entered by the Authorized Submitter when it after the date the educator has completed all requirements for the document. The date must be no more than 90 days prior to the day it is paid for and received by the Commission.

Issue Date field

There are two options available for entering the document's effective date in the ***Issue Date*** field.

Enter the ***Date*** with the (MM/DD/YYYY) format to populate the field.

OR

Click the ***Date*** field calendar icon, select the month and year then click on a date.

- Click ***DONE*** to populate the field.

Document (Credential) Title field

Select the **Document Description, Term, and Category** for the document. If the document title is not listed, please go to the Agency User – Authorized Designees and Submitters section for information on how to contact the Commission.

When an educator's file only displays a Certificate of Clearance, the correct document category to select is **First Time (FT)**.

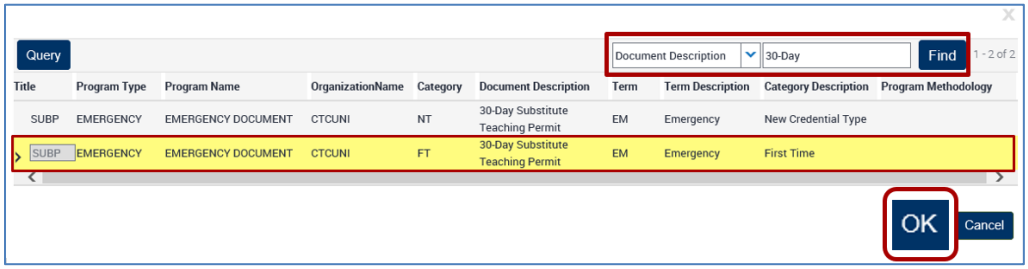
Enter the Document Title in the ***Document Title*** field.

There are two options available for populating the ***Document Title*** field.

- Enter part of the Document Title in the ***Document Title*** field to view a pop-up window displaying all matching documents.

OR

- Click the ***Document Title*** field pick applet to view a pop-up window displaying all documents available to the Authorized Submitter.
- Change the search field from ***Title*** to ***Document Description*.**
- Enter part of the Document Description, e.g. 30-Day.
- Click the ***Find*** button and/or arrows on the pop-up window to view the available information.
- Click on the row to select the correct **Document Description, Term, and Category**.
- Click ***OK*** to populate the fields.



Troubleshooting a blank pop-up window.

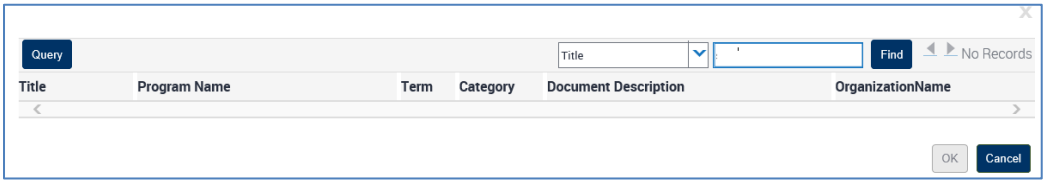
When a blank pop-up window appears, please check the following:

- The information entered is *not* an exact match to the available information.

The information in the field is case sensitive.

- Check with your Organization's Authorized Designee to confirm you have been authorized to submit the recommendation. If you have been authorized, please email CTCOnline@ctc.ca.gov describing the problem and identify which

Programs and/or Authorization Codes are needed as your User ID may not be properly linked.



County of Employment field

There are two options available for populating the ***County of Employment*** field.

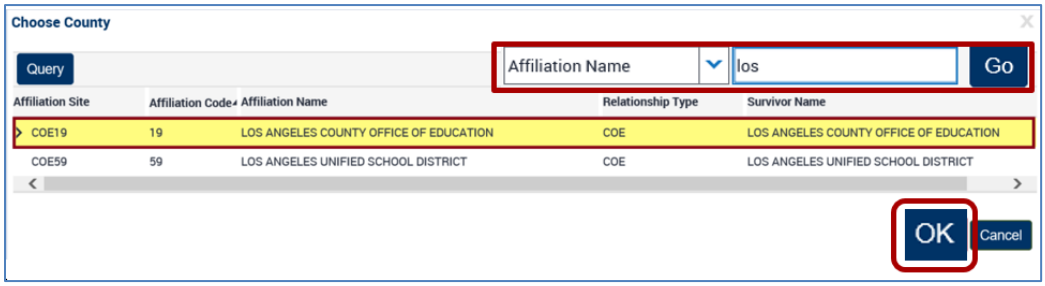
Enter the educator's County of Employment (COE) in the ***County of Employment*** field.

- If there is an *exact* match to the information entered, the field will populate.
- If there is more than one match or there is *not* an exact match, a pop-up window will display.

OR

Click the ***County of Employment*** pick applet to view a pop-up window displaying all COE information.

- Change the search field from ***Affiliation Site*** to ***Affiliation Name*** to search by organization name**.**
- Enter the educator's County Office of Employment.
- Click the ***Go*** button and/or arrows on the pop-up window to view the available information.
- Click on the row with the correct COE information.
- Click ***OK*** to populate the field.



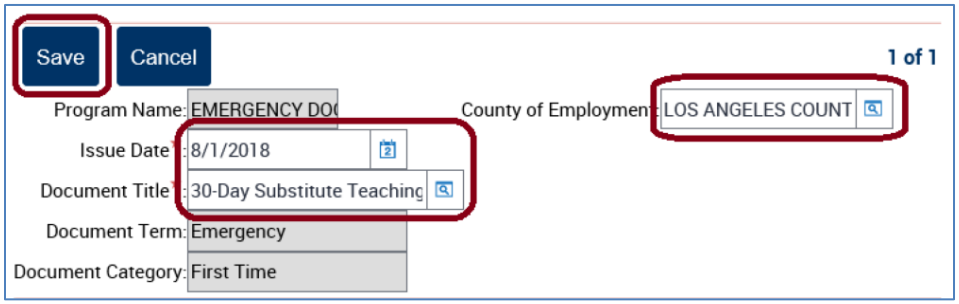
All of the fields for the *first* section of the document are populated.

Review the information for accuracy.

- When information in a field is incorrect, select an editable field, delete the

information and repeat the previous steps for entering the correct information in that field.

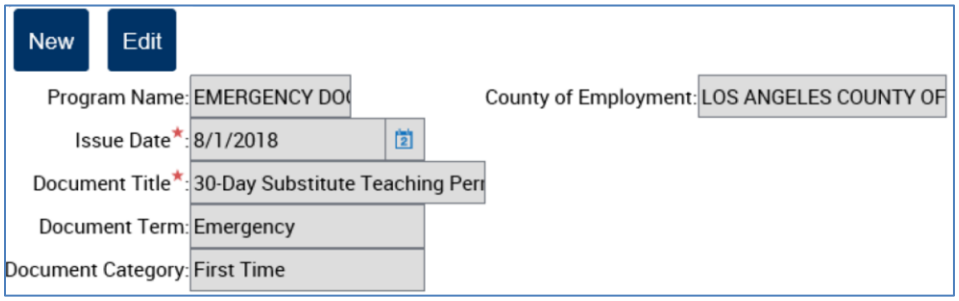
Click ***Save*** to complete this section.



In the example below, the ***Save*** button was selected.

The *first* section of the document has been successfully created and saved.

This section displays a First Time Emergency 30-Day Substitute Teaching Permit.



Review the *second* and *third* sections of the document

The ***Authorization/Subjects*** and ***Renewal Requirements*** sections are pre-populated based on the *Document Title* selected in the *first* section.

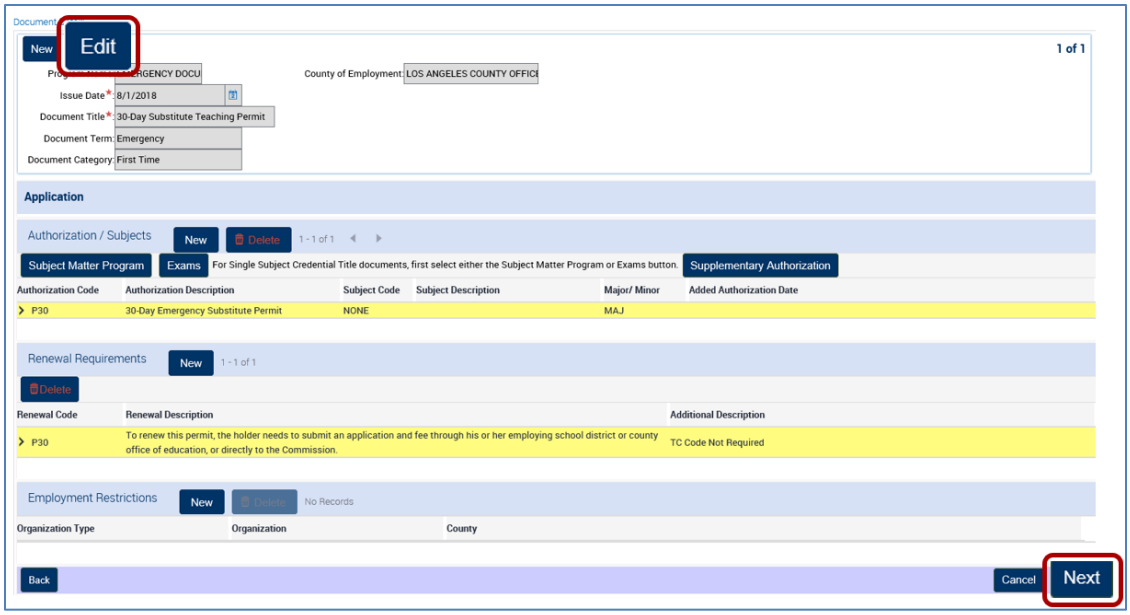
Review the information for accuracy.

Click the ***Edit*** button to open the editable fields in the *first* section if changes are needed.

Do not click on the buttons in the *second* or *third* sections.

Delete the information in the editable fields and repeat the previous steps for entering the correct information in the fields.

Finish submitting the document by clicking ***Next*** to add any required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the document status to **deleted and purged**.

Authorized Agencies – Go to Edit Document

The ***Edit*** or ***Go To Edit Document*** button becomes available for selection when an Authorized Submitter selects a document created by the educator and has one the following status:

- In Progress
- Recommended
- Awaiting Payment
- Educator Return
- Ready for Submission

When the application displays the status of "**Pending**", the Educator has already completed the application and payment process and the document has been received by the Commission. This document status displays on the *Educator Detail* view.

➢ Click the ***Edit*** button when using the *My Filtered Recommends* view.

- Click the ***Go to Edit Document*** button when using the *Authorized Agencies* view.

My Filtered Recommends view – Edit

Log into the CTC Online system

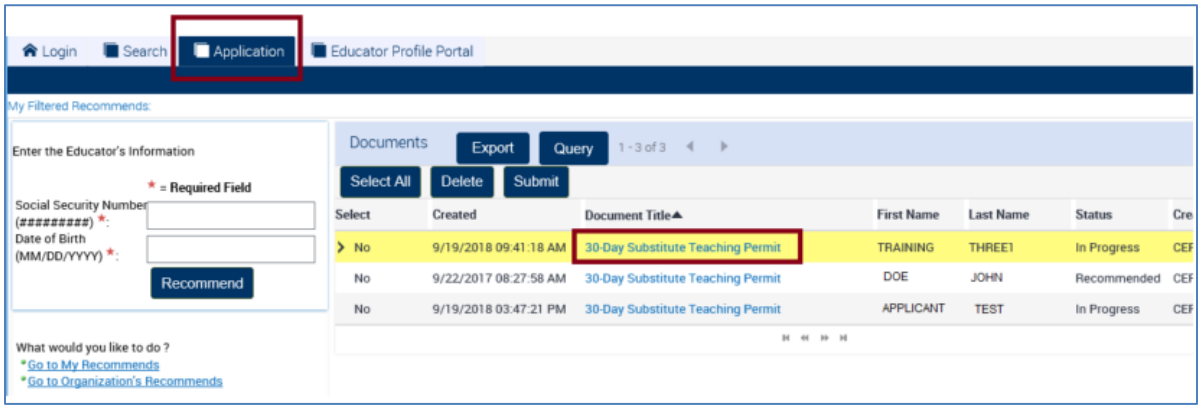
- When the *Welcome Back* view displays, click the *Application* tab
- If you are logged in, click the *Application* tab

My Filtered Recommends view

Click on the ***Document Title***.

Use the arrows or the ***Query*** button to locate the document.

When the document you wish to edit does not display on this view, it may have been deleted. Re-create the document following the steps outlined in the Create New Document section.



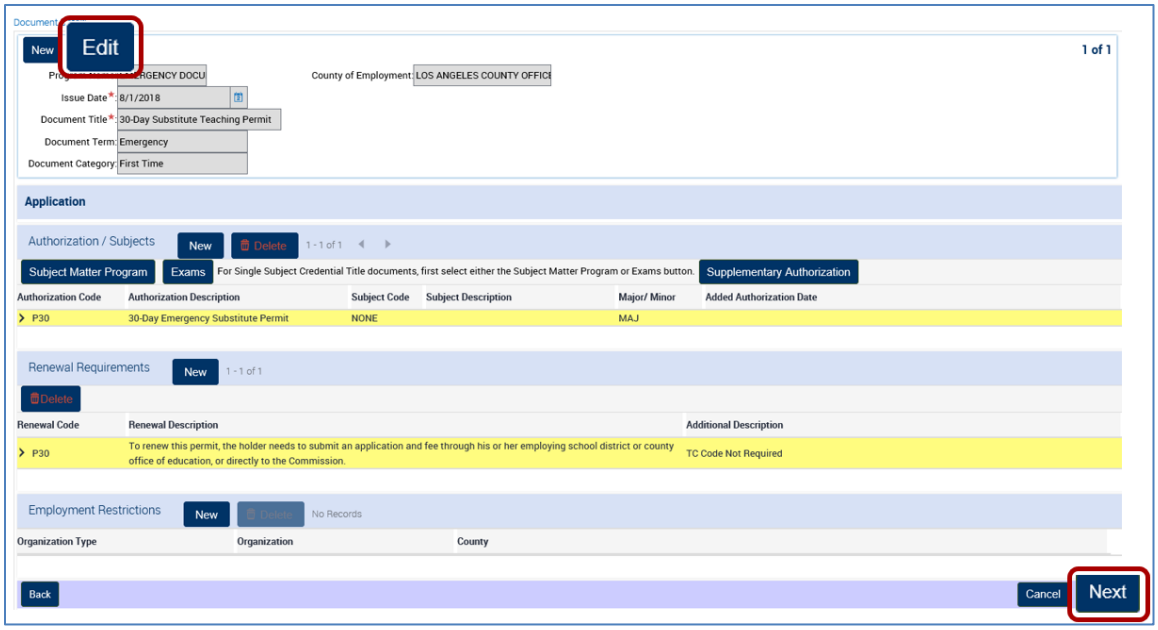
Document Details view

Review the information for accuracy.

Click ***Edit*** to open the editable fields in the *first* section if changes are necessary. Delete the information in the editable fields and repeat the steps for entering the correct information in the fields.

Do not click on the buttons in the *second* or *third* sections.

Finish submitting the document by clicking ***Next*** to add required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button is not active on this view.

Authorized Agencies view – Go to Edit Document

The steps to edit a document using the ***Go to Edit*** button are:

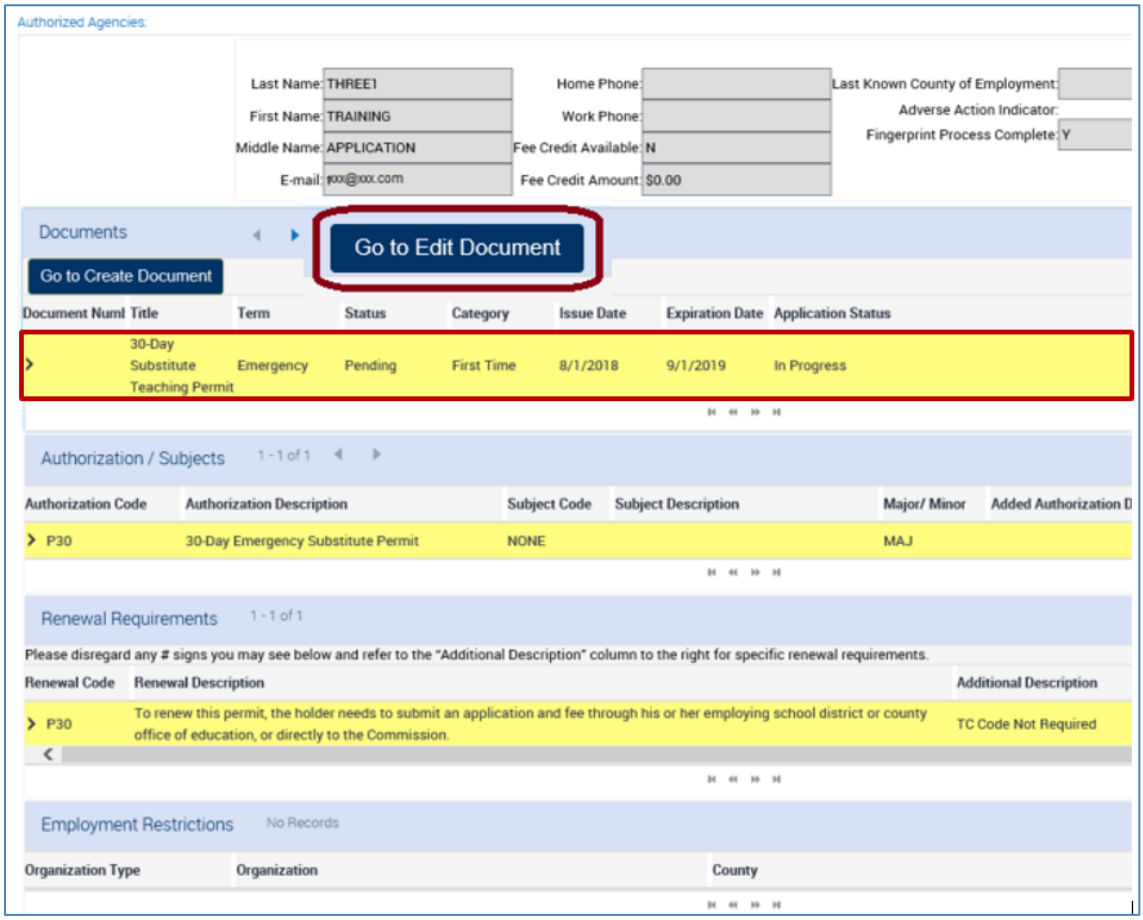
- Log into the CTC Online system
  - When the *Welcome Back* view displays, click the *Application* tab
  - If you are logged in, click the *Application* tab
- Enter the educator's **Social Security Number** (SSN) and **Date of Birth** (DOB)
- Click ***Recommend***
- Verify the information on the *Educator Information* view and click **Next**
  - If the information displayed is not for the Educator, go to the Troubleshooting SSN & DOB Issues section of this handbook for more information.
  - The ***Create Person*** button is not available on this view.
- Click ***Authorized Agencies*** on the *Educator Detail* view

Authorized Agencies view

Click on a row of information (document). Additional information of the highlighted document will display in the sections below.

Click ***Go to Edit Document*** to open the *Document Detail* view of the highlighted row.

When the document you wish to edit does not display on this view, it may have been deleted. Click ***Go to Create Document*** to re-create the document.

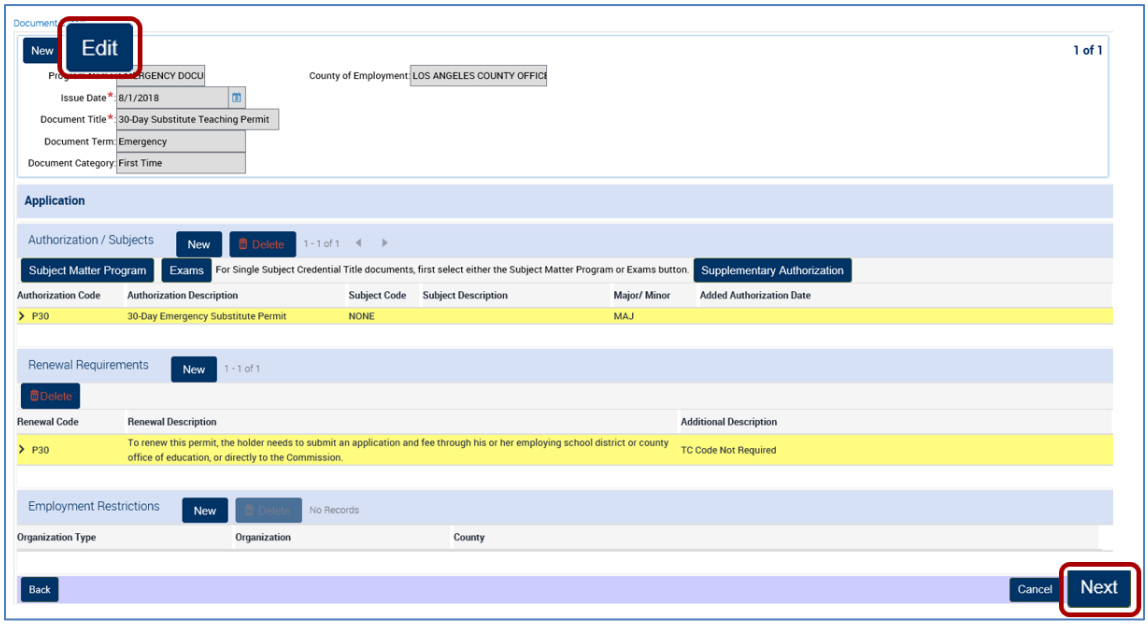


Document Detail view

Review all of the information displayed on this view.

- Click ***Edit*** to open the fields in the *first* section if changes are necessary.
- The **Authorization/Subjects** and **Renewal Requirements** section is pre-populated based on the Document Title selected in the *first* section.

Finish submitting the document by clicking ***Next*** to add any required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the document status to **deleted and purged**.

Agency User – Employment Restrictions

Some documents are restricted to employing organizations. The employing organization must be selected so it will display on the document. The Commission staff creates a unique employing agency code for each school district, county office of education, charter and non-public school in our database.

Employment Restriction Organization Types

The Organization Types codes available when using the drop down menu are listed below:

COE	County Office of Education
CS	Charter School
NPS/NPA	Non-Public School/Non-Public Agency

SCS	Statewide Charter School
SD	School District
SWA	Statewide Agency

How to add an Organization to the database

When an Organization does not display under the appropriate category code, please visit the California Department of Education, California School Directory at http://www.cde.ca.gov/schooldirectory/. The California School Directory contains information about all California public schools, private schools, nonpublic nonsectarian schools, school districts, and county offices of education.

If the Organization you wish to use as a restriction is in the CDE database, contact the Commission's Division of Licensure Certification at Contact Us | Commission on Teacher Credentialing

to request it be added. If an Organization is not in the CDE database, it will not be added by the Commission. When you receive notice that the Organization has been added, you will be then able to submit your document with the employment restriction.

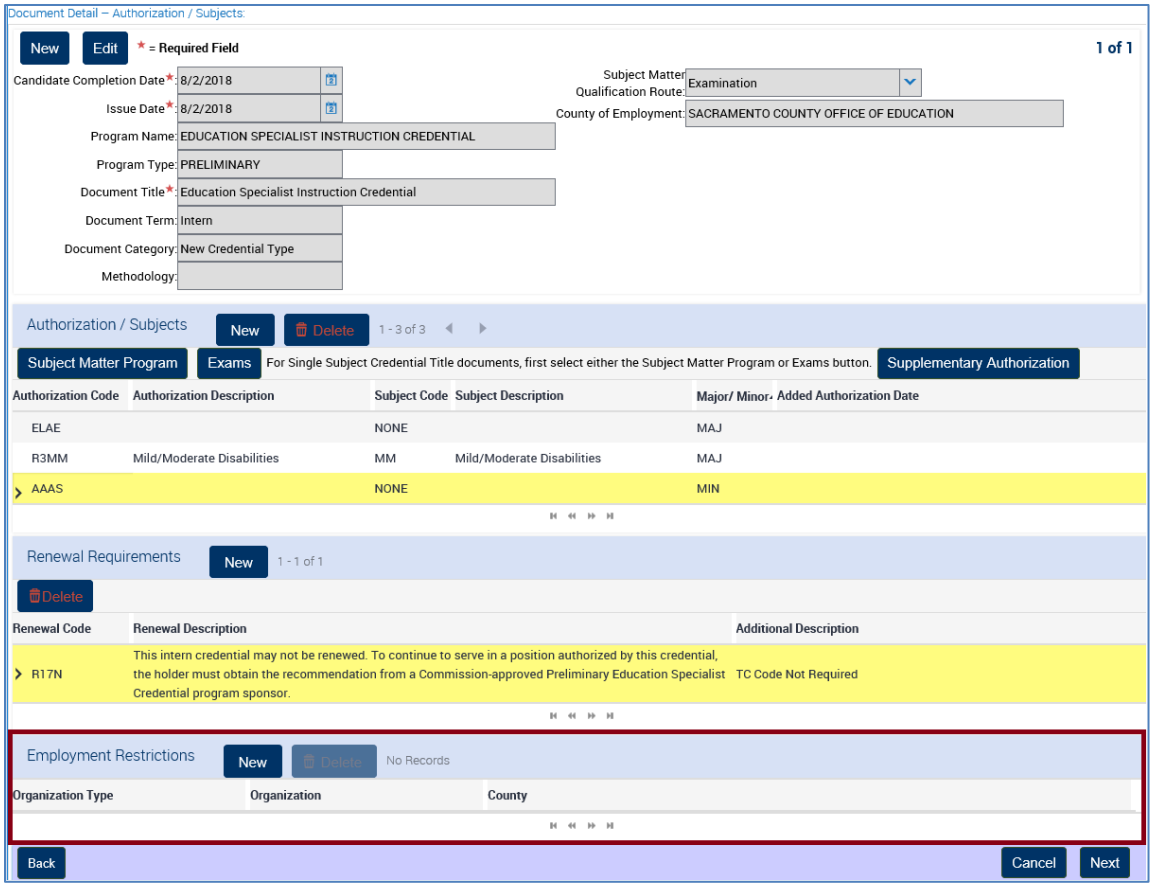
Employment changes cannot be completed using the CTC Online system. When adding an authorization or changing an employment restriction on an existing document:

- Submit a *paper* recommendation and half fee to change a restriction.
- If the restriction listed is wrong, email a correction request. Please see the Agency Users - Corrections section for additional information.

The *fourth* section of the document

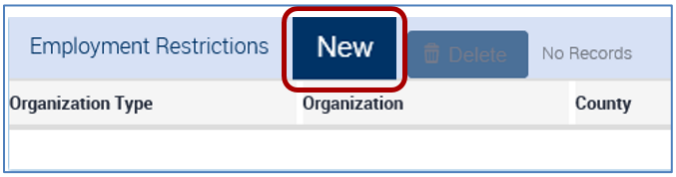
This section describes the process for creating a recommendation and adding an **Employment Restriction** to the following credential:

- **Intern Education Specialist Instruction Credential** restricted to the Sacramento County Office of Education.



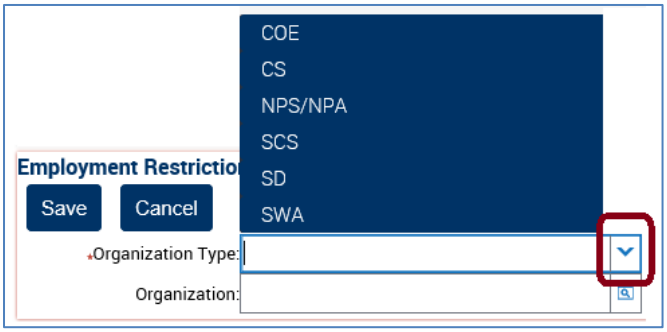
Enter the Organization to which the document will be restricted.

Click the ***New*** button to open the fields.



Click the ***Organization Type*** field arrow to view the drop down menu.

Select an *Organization Type* to populate the field.



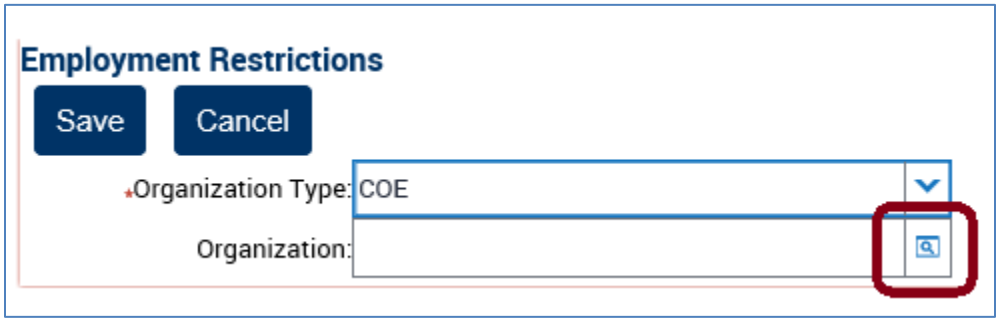
Organization field

There are two options for populating the ***Organization*** field.

- Enter the Organization's name in the ***Organization*** field.
  - If there is an *exact* match to the information entered, the field will populate.
  - If there is more than one match or there is *not* an exact match, a pop-up window will display.

OR

- Click the ***Organization*** pick applet to view a pop-up window displaying all COE information.



The ***Organization*** pop-up window

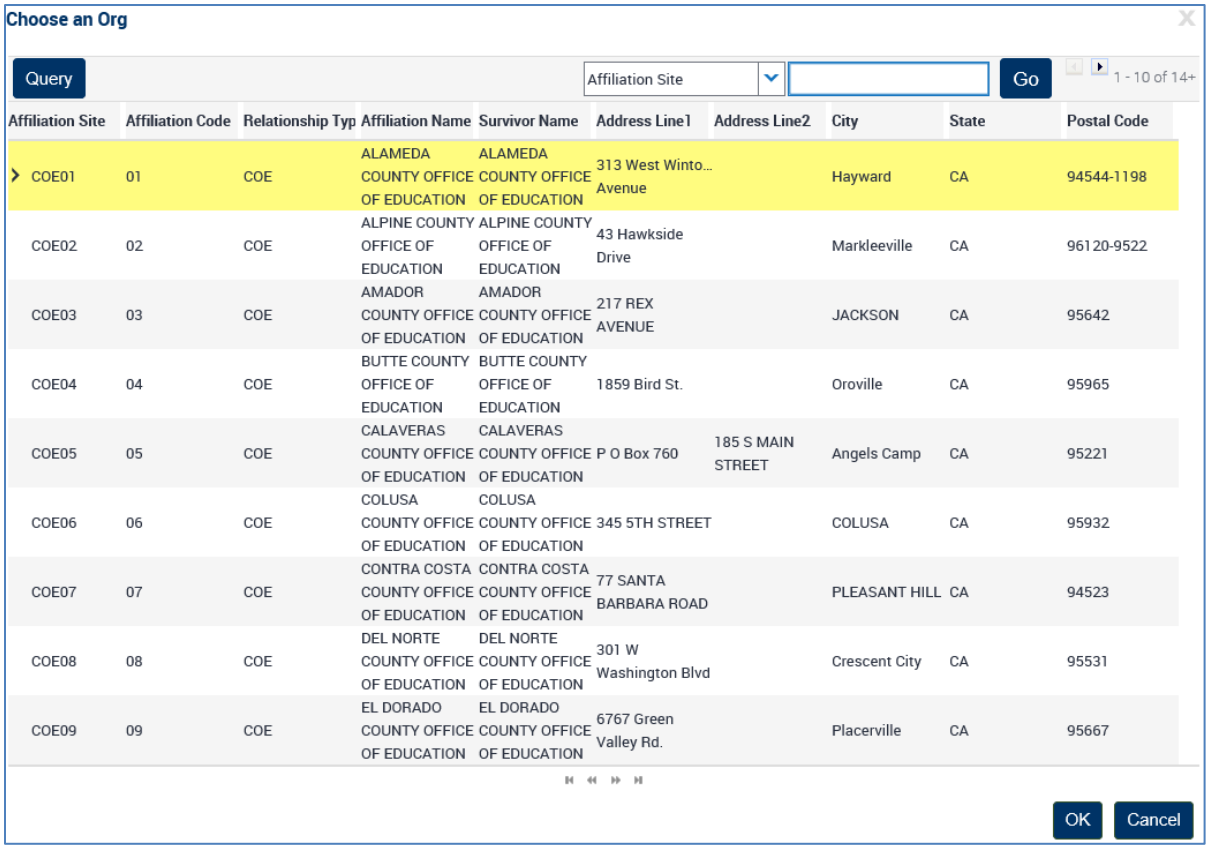
The default view displays the information sorted in numerical order by ***Affiliation Site***.

There are two options for locating the *Organization* information when the appropriate Organization does not appear within the first window.

- Use the arrows on the pop-up window to view the available information.

OR

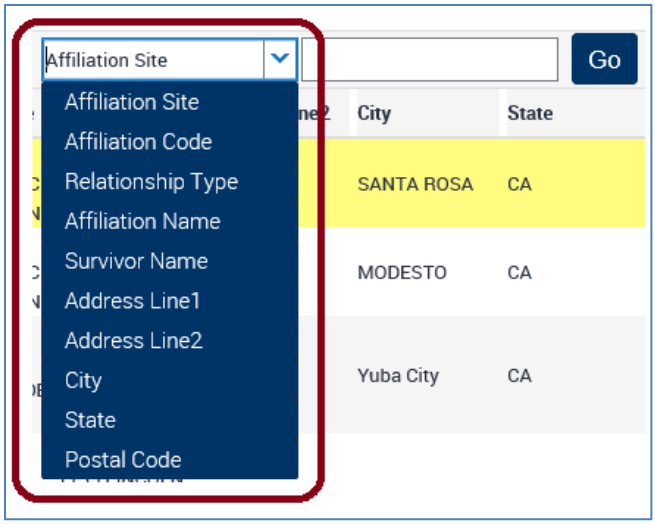
- Change the search field from ***Affiliation Site*** to ***Affiliation Name***.



Search by **Affiliation Name**

- Click the drop down arrow in the *first* data field to display a list of column names in the pop-up window.

- Scroll down the list and select ***Affiliation Name*.**
  The selection will become highlighted and automatically populate into the field.



In the ***second*** data field, enter the information applicable to the data displayed within that column.



Click the ***Go*** button and if there is an ***exact*** match to the entered information, the field will populate.

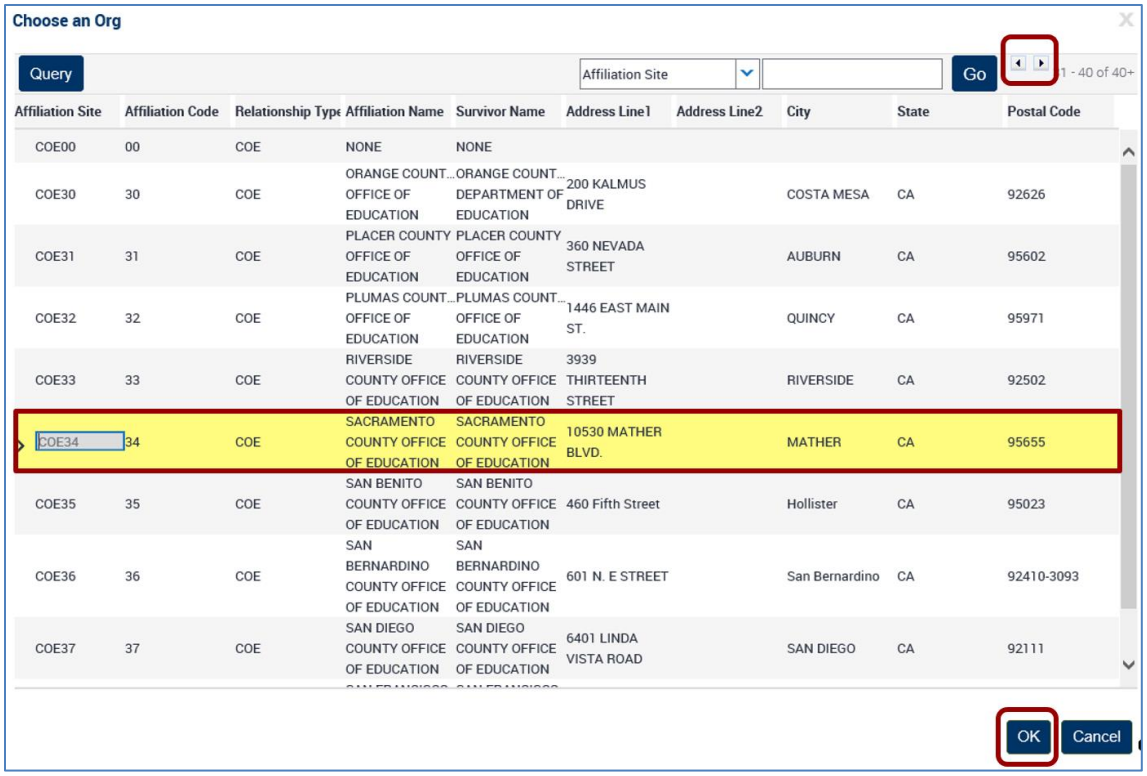
- If there is ***not*** an exact match to the entered information, a pop-up window will display.
- If no information matches the entered information, the pop-up window will display a blank row.

If the *Organization* does not display after multiple attempts, it may not be in the database. Go to the How to add a school to the database section for additional information.

Use the arrows on the pop-up window to view the available information.

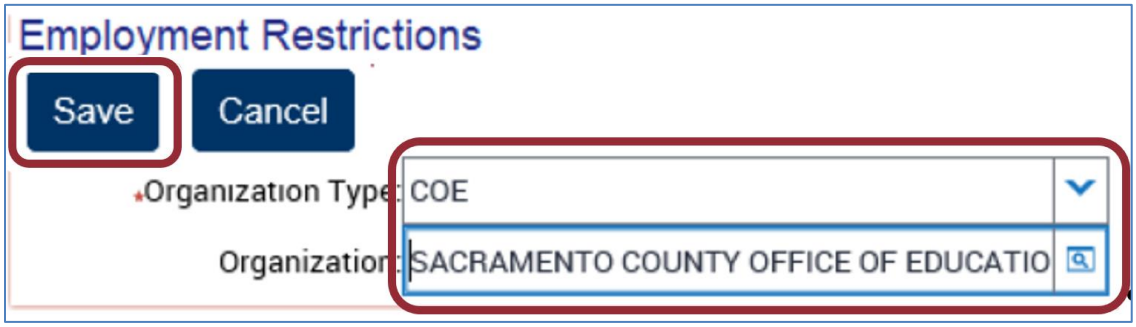
Click on a row with the correct information.

Click ***OK*** to populate the fields.



All of the fields for the ***Employment Restrictions*** section are populated.

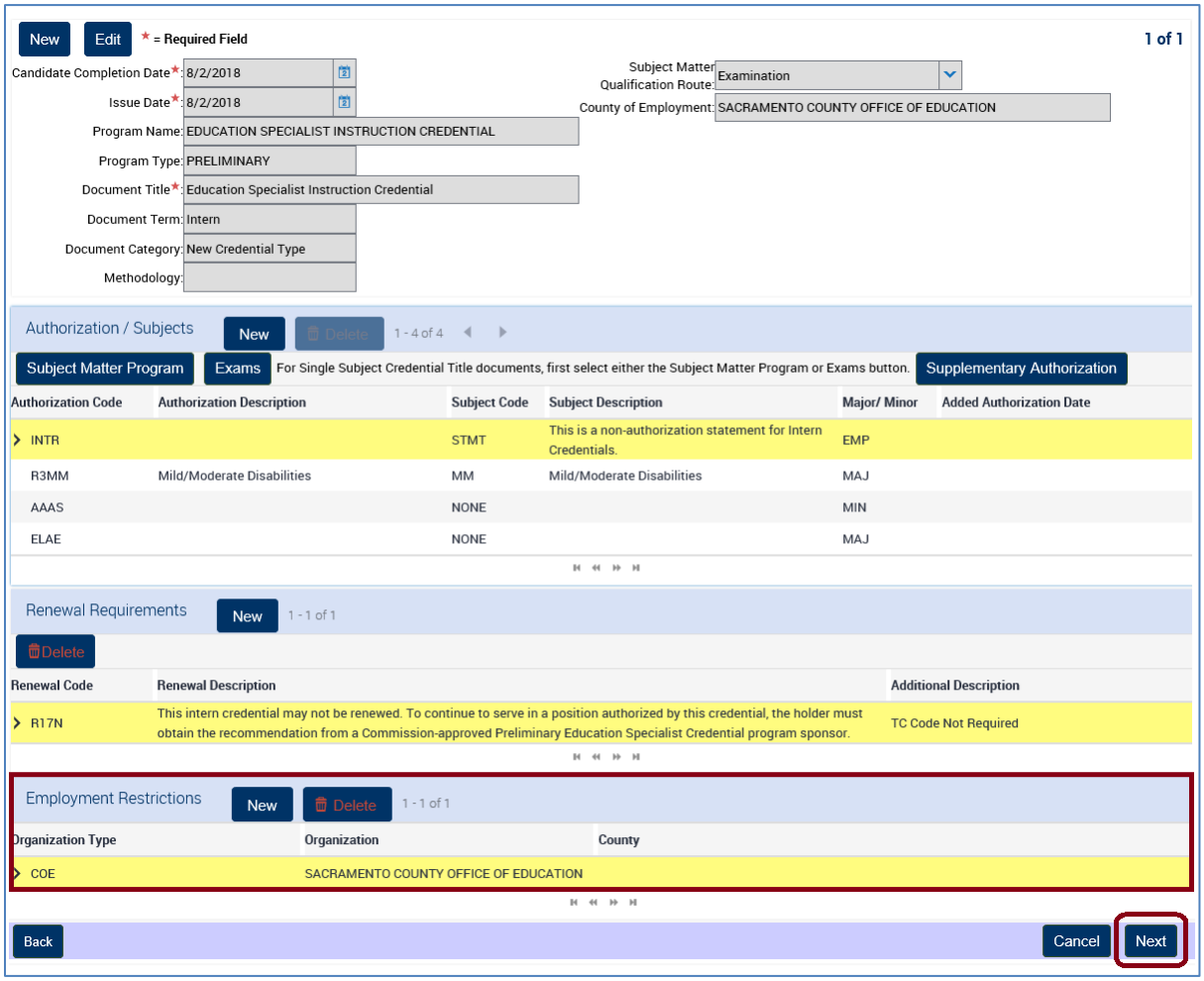
- Review the information for accuracy.
  - When information in a field is incorrect, click on a field and either delete the information or click the menu icon/pick applet, and repeat the previous steps for entering the correct information.
- Click ***Save*** to complete this section.



The *fourth* section of the document has been successfully created and saved.

The ***Employment Restrictions*** section displays the document is restricted to the Sacramento County Office of Education.

Finish submitting the document by clicking ***Next*** to add any required Attachments.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Cancel*** button to the bottom left of the ***Next*** button will **delete and purge** the document.
- The ***Back*** button at the bottom left may change the document status to **deleted and purged**.

Agency User – Attachments

Some documents require supporting materials. If attachments (supporting materials) are required, electronic copies can be attached during the electronic submission process by an Authorized Submitter.

File Name

Naming the file with the Educators' Last Name and First Initial along with a brief description assist the analyst to quickly locate the document(s).

- Example: Washington,G_transcripts.pdf

Attachments

- Files must have an extension of **.jpg, .pdf, .doc or .docx**.
- Each file must be **less than 10 MB** in size



When an incorrect file is attached, do not delay the submission process. Attach the correct file(s) and continue with the submission process. The educator does not have access to view the attached files.



Email a correction request if an attachment should be removed after submission and payment by the educator. Please go to the Agency User Views - Corrections section for additional information.

Degree Verification

Attach degree verification if the educator never held a CA credential or permit that required a bachelor's degree or higher. The conferral of a baccalaureate or higher degree from a regionally-accredited college or university must be included as part of the submission process.

Review the *Form 41-4 Application Instructions and Information Sheet* for current information on degree acceptability.

Basic Skills Requirement

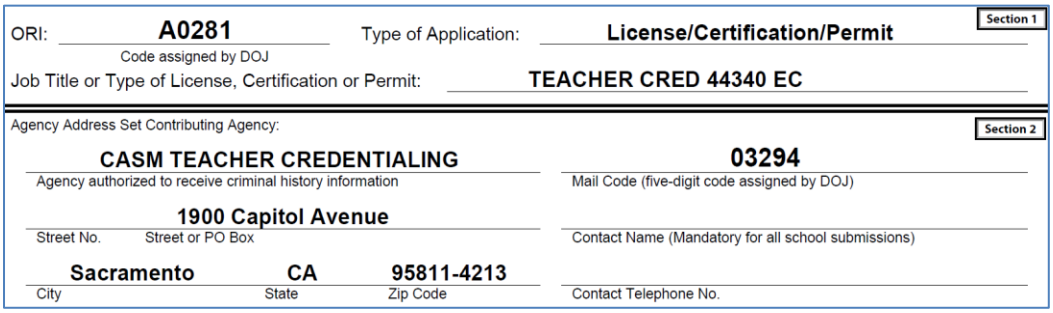
Attach verification of the Basic Skills Requirement by examination or other approved methods, if required.

The Commission reserves the right to request evidence of examination passage even when those scores are normally transmitted to the Commission.

Fingerprint identification process

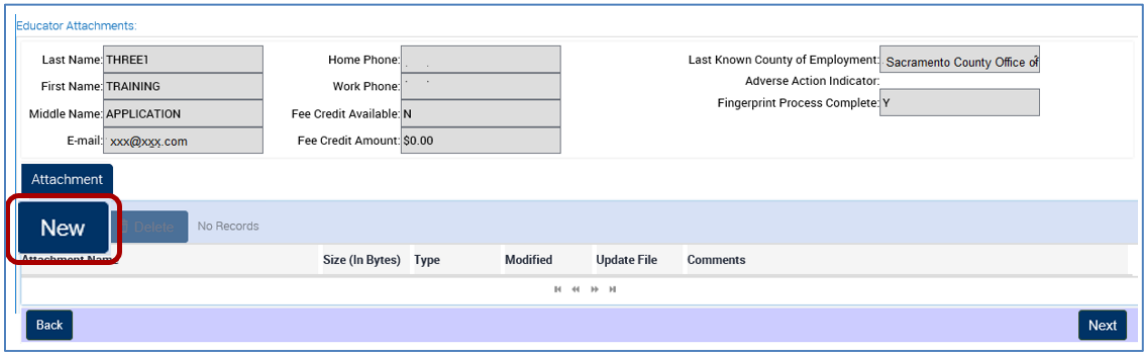
Attach verification of Fingerprint Clearance if the **Fingerprint Process Complete** field does not display a "**Y**". When submitting a completed 41-LS Live Scan form, *ORI A0281* and *CASM Teacher Credentialing* must be listed as shown below.

The name listed on the 41-LS Live Scan form must be the Educator's full legal name as listed on the educator's official form of identification and on the Educator Profile.

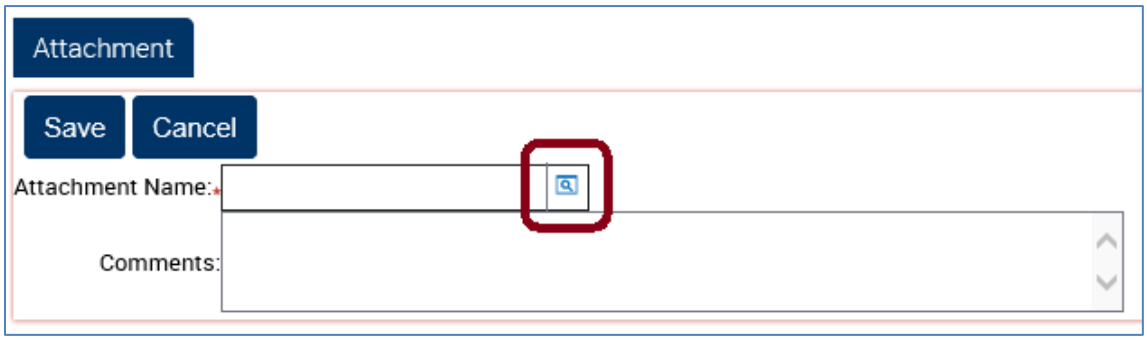


Educator Attachments view

Click the ***New*** button to open the fields.



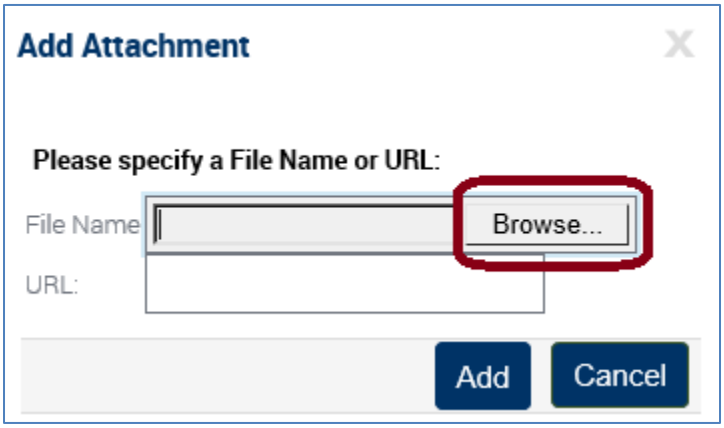
Click the ***Attachment Name*** pick applet.



***Add Attachment* pop-up window**

Click the ***Browse*** button.

- A new pop-up window will display.



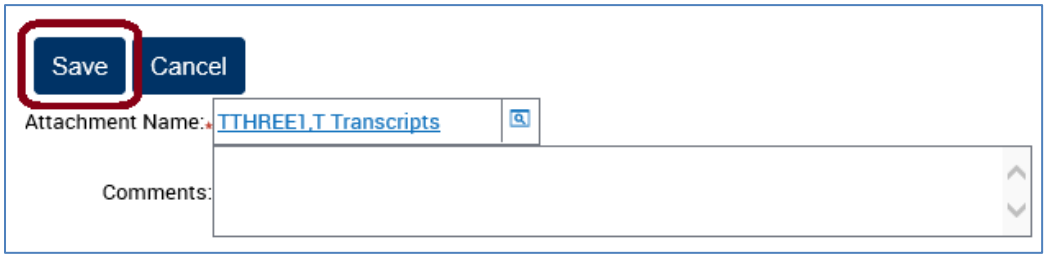
Locate the file on your computer and select it to populate the field.

Click in the **Comments** field to type additional information describing the attachment, if necessary.



Click ***Save*** to add the file as an attachment.

Repeat the previous steps until all files are attached.



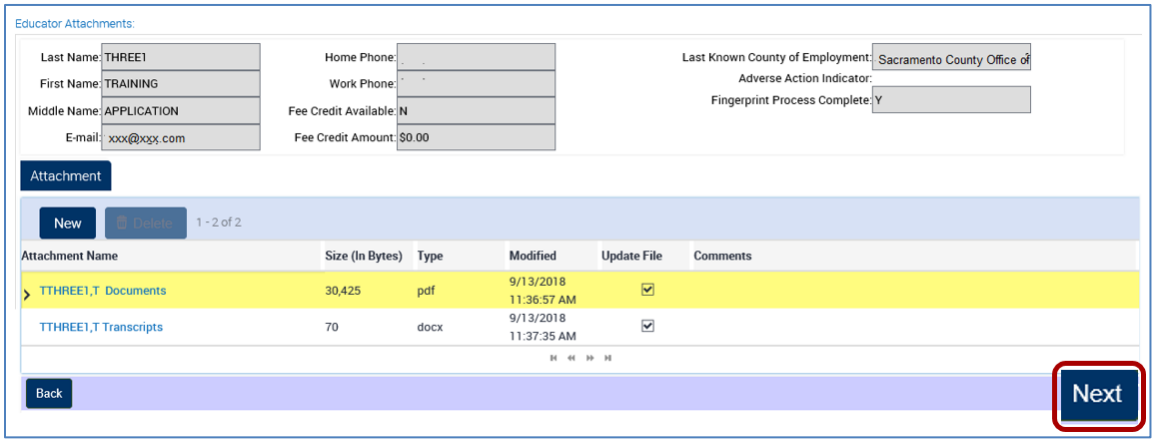
In the example below, the attachments have been successfully saved.

To view the attached documents, click on the ***Attachment Name*** hyperlink.

- Each attachment's name displays as a hyperlink under the **Attachment Name** field on the *Educator Attachments* view.

- After the educator submits the application and payment to the Commission, the attachment(s) is no longer available to the Authorized Submitter.

Finish submitting the document by clicking ***Next*** to view the *Application Summary* and complete the Declaration.



From this view:

- Click the *Application* tab to save and close the document with a status of "**In Progress**" and return to the *My Filtered Recommendations* view.
- The ***Back*** button at the bottom left may change the document status to **deleted and purged**.

Agency User – Application Summary

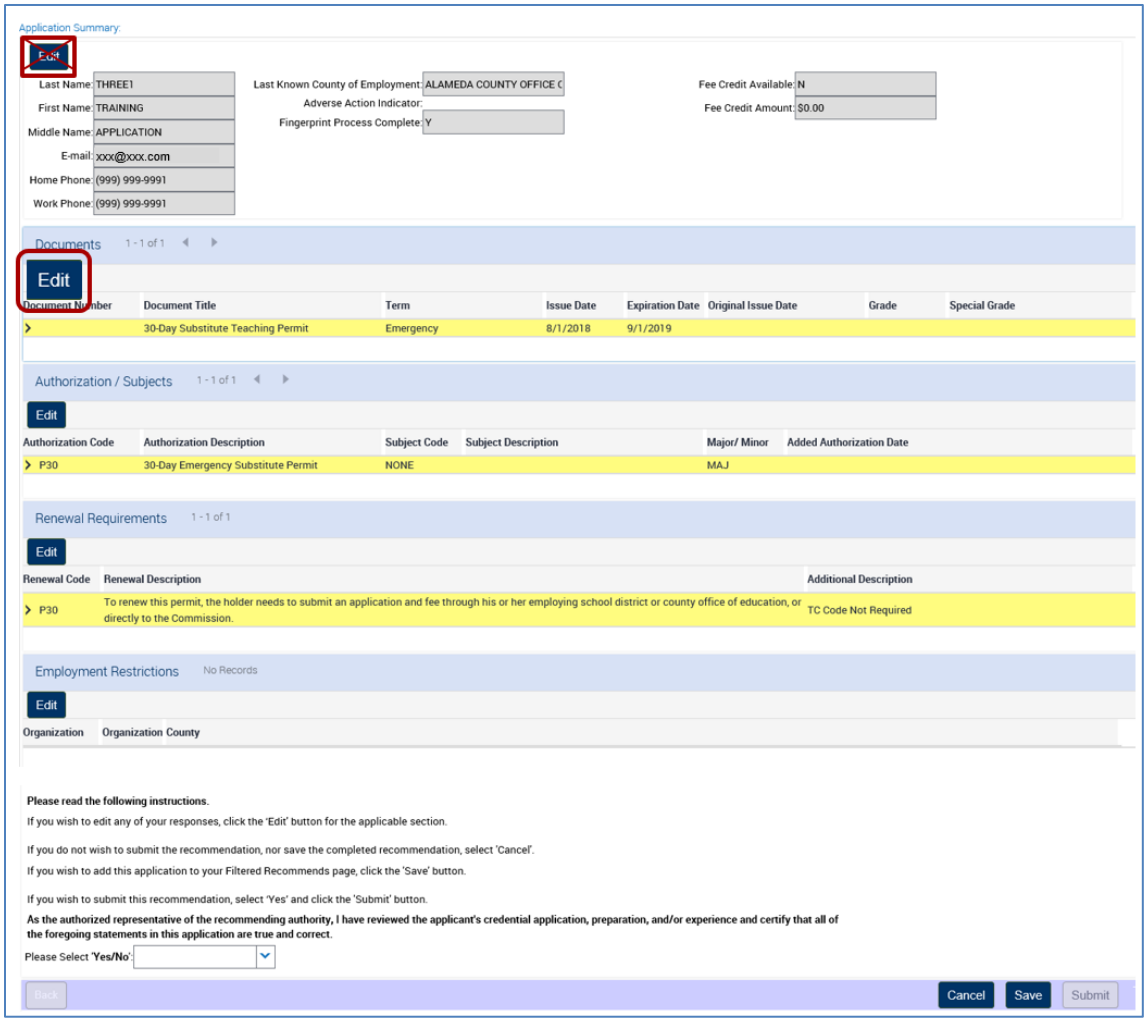
The *Application Summary* view summarizes the information entered for the document and includes the *Declaration* section.

Application Summary view

Review the information.

Click the **Edit** button to return to the *Document Detail* view.

The **Edit** button in the *first* section returns to the *Educator Information* view. This information cannot be changed using the CTC Online system.



Agency User – Authorized Submitter Declaration

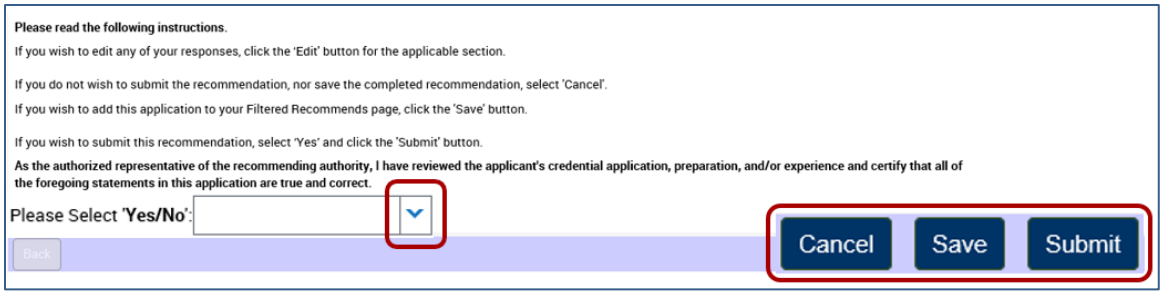
Completion of the *Declaration* section is required before the document can be submitted. The Authorized Submitter is confirming the educator is authorized to submit the document, has reviewed the educator's application, preparation and/or experience, and certifies the information submitted is true and correct.

Recommending agencies are encouraged to retain copies of the application form, verification of completion form, and supporting materials for their records.

Click the **Yes/No** field drop down arrow and select either ***Yes*** or ***No***.

Click the ***Cancel***, ***Save***, or ***Submit*** button.

- The ***Submit*** button will become active when ***Yes*** is selected.
- The ***Back*** button is not active on this view.



Below is a chart displaying the results for each combination.

Documents with the status of **Deleted and Purged** are listed on the *My Recommends* view and must be recreated for submission.

Selection	Document Status	Returns Submitter to	Recommendation Displays On Educator Page
Cancel or No / Cancel	Deleted and Purged	Approved Institutions or Authorized Agency view displaying the Educator's information	No
No / Save	In Progress	My Filtered Recommends	No
Yes / Save	Ready for Submission	My Filtered Recommends	No
Yes / Submit	Recommended	My Filtered Recommends	Yes

Agency User – Emails

An automated email will be sent to the Authorized Submitter when:

- The Document has been completed and submitted to the Educator
- The Educator has completed the application and payment process for the Document.
- The Educator returns the recommendation to the authorized submitter.

Logout of CTC Online

Click the ***Person*** icon.

Click ***Logout*** to securely exit the online system.



Agency User – Corrections

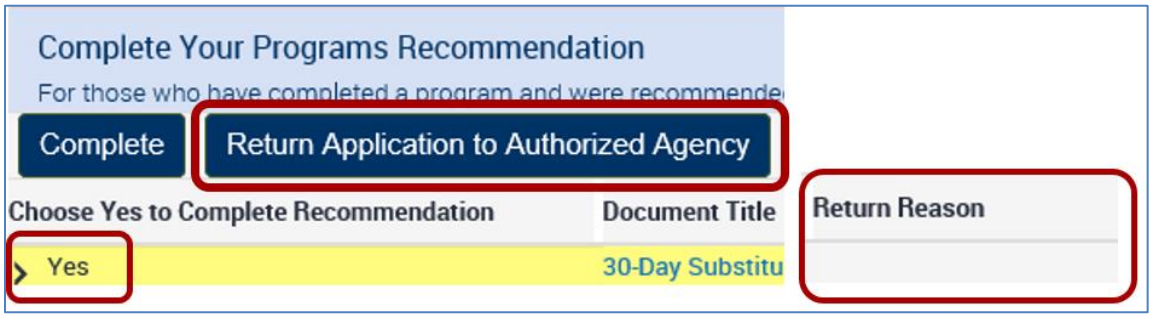
Corrections for documents are handled differently depending on its application or document status. A correction can be made to the document prior to the educator returning it to the authorized submitter or submitting the application and payment to the Commission.

Before an application has been submitted to the Commission by the Educator, Authorized Submitters may review and/or edit any document that displays on the *My Filtered Recommends* view.

- Instructions to edit a document for Authorized Institutions
- Instructions to edit a document for Authorized Agencies

Educator Return

Educators have the option to return an application to the recommending agency or institution prior to completing the application and payment process if they identified an error. To return an application to the recommending agency or institution, educators select the document, enter the reason for returning the application in the '**Return Reason**' field and then select the '**Return Application to Authorized Agency**' button. The document will no longer display on the *Educator Page*. Review the *Written Instructions for Application and Payment – Return Your Program's Recommendation* page for additional information on this process.



The Authorized Submitter will receive an email, and the document status will change to

"**Educator Return**" on the *My Filtered Recommends* view. The Authorized Submitter selects the document, opens it to review, and determines if any information needs to be corrected and, if needed, edits and saves the new information. The Authorized Submitter will continue the submission process as usual to resend the document to the educator.

Correction Requests

A document submitted by an Authorized Submitter may need to be corrected prior to the educator submitting the application and payment to the Commission. The Authorized Submitter can make document corrections through the *My Filtered Recommends* view.

A correction may be necessary after the educator submits the application and payment to the Commission. Corrections are free of charge. Corrections of a credentialing nature (incorrect issue date, removing an existing authorization, missing authorization, incorrect attachment, etc.) must be requested by the recommending agency.

A message requesting a correction must be sent to the Commission's Division of Licensure Certification at Contact Us | Commission on Teacher Credentialing

Please include all of the following information:

- Document holder's first, middle and last name and, if applicable, previous names
- Reason for the correction
- The correct information to be included on the new document



Go to Troubleshooting SSN, DOB and Name Issues when a correction to an educator's SSN, DOB and/or Name is required.

Educator Profile Portal tab

The *Educator Profile Portal* tab displays when an Authorized Designee or Submitter is logged into their account. The portal provides Authorized Submitters read-only access to view the information on the *Educator Page*. This view can be a useful tool when educators cannot view a recommendation or renewal. Authorized Submitters can use this tab to verify what the educator sees and troubleshoot the issues accordingly.

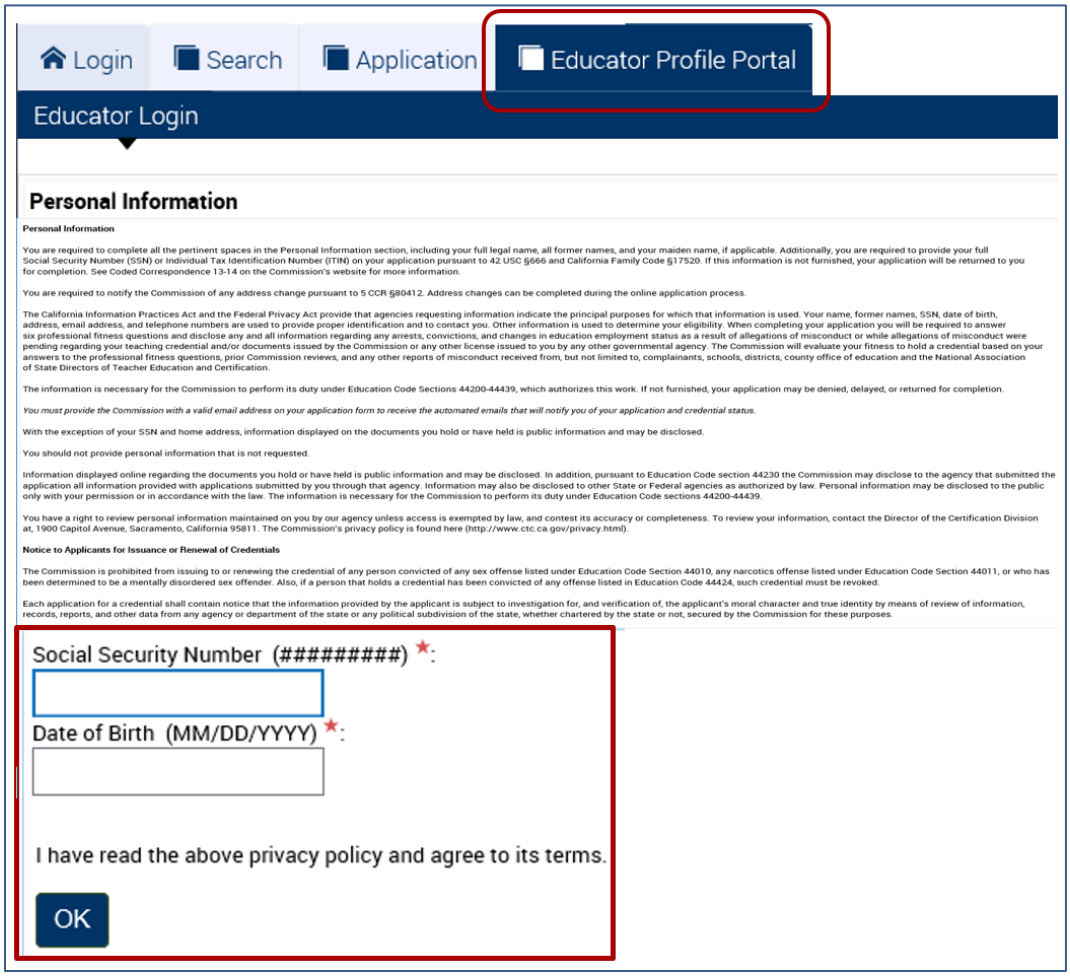
It does not allow access to an educators Professional Fitness Questions, the application or payment process.



Some information displayed using this portal is confidential and is not for public viewing.

Educator Profile Portal view

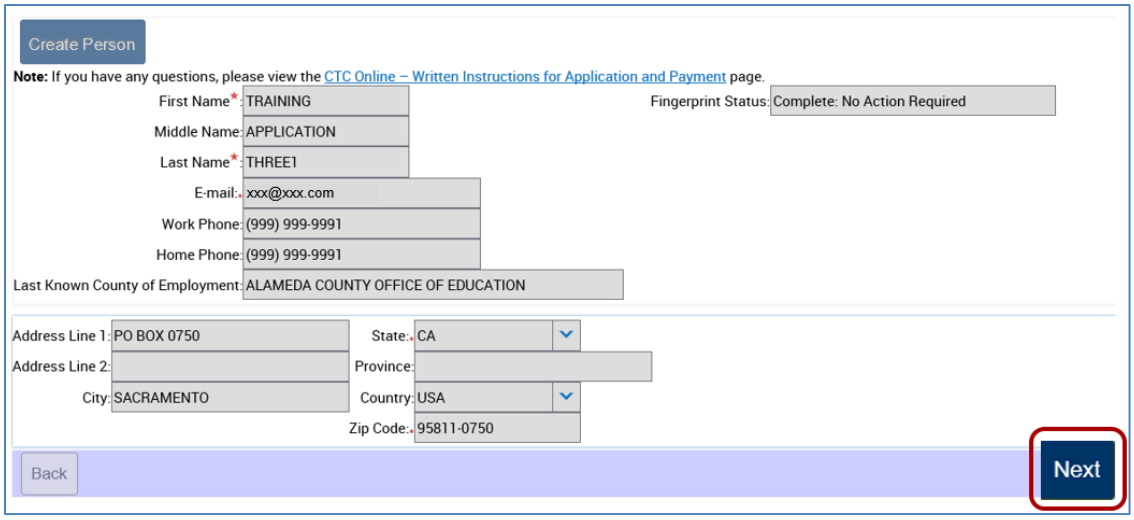
- Enter the educator's **Social Security Number** and **Date of Birth**.
- Click ***OK*.**



Educator's Information view

The educator can update the information when the educator has logged into the CTC Online system.

- Review the educator's information. The information displayed is provided in a read-only view and is for verification purposes only.
- Click ***Next*.**



Educator Profile – Educator Page

IMPORTANT SECURITY REMINDER
Always lock the computer screen if you have not securely logged out using the ***My Account - Logout*** link.

The information for the last educator displayed on the *Educator Profile* view will continue to display until the Authorized Submitter securely logs out.

The *Educator Profile* is a read-only view of the *Educator Page*. This view is provided to Authorized Submitters as a tool to assist educators with the online recommendation process.

Additional information about this view is available on the Commission's website under CTC Online – Your Educator Account and CTC Online – Written Instructions for Application and Payment.

Educator Profile view

The top section of the *Educator Profile* view displays general information about the educator.

The ***Last Known County of Employment*** information displayed here is entered by the educator from the *Educator Page*. It does not populate the document's *County of Employment* field entered by an Authorized Submitter.

A "**Y**" in the ***Fingerprint Process Complete*** indicator does not authorize the educator to be placed in the classroom. Its purpose is to indicate whether the fingerprint information from the FBI and DOJ has been

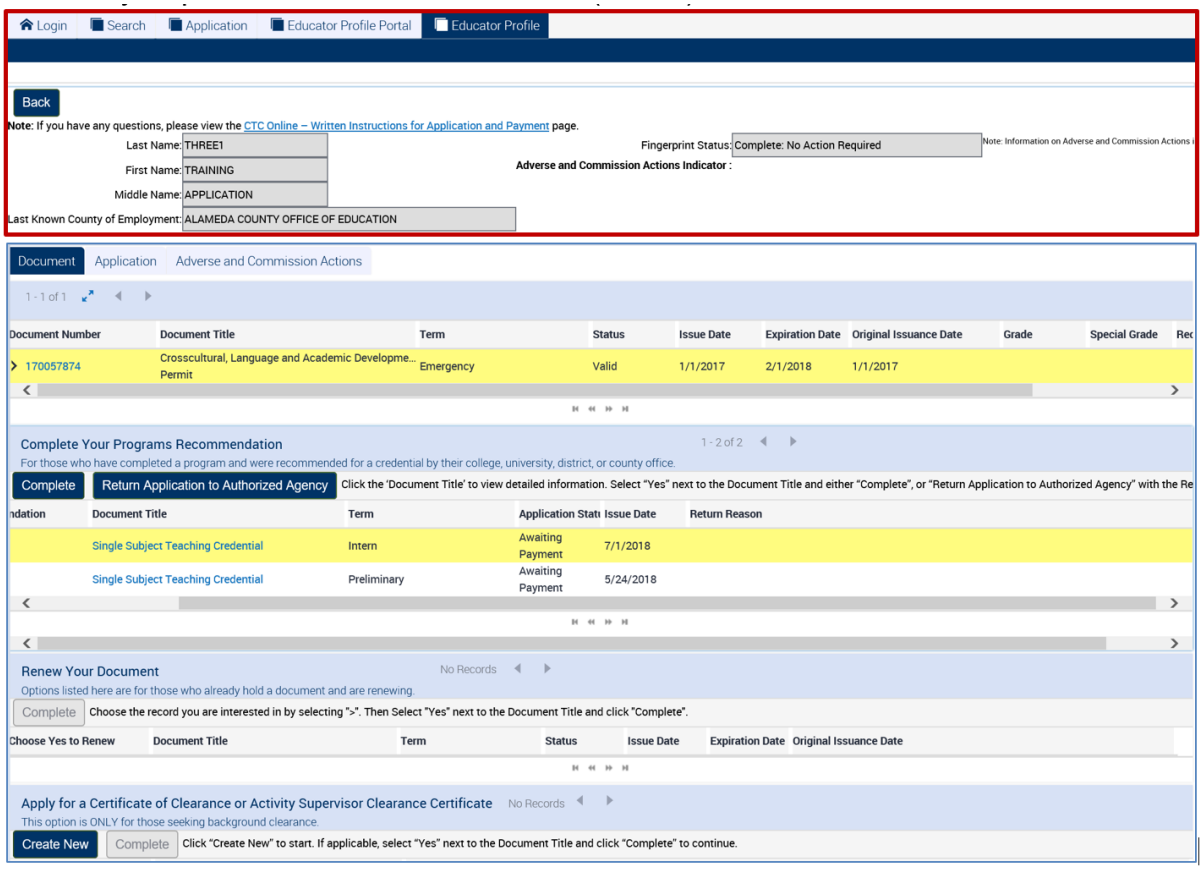
received by the Commission.

The ***Fingerprint Process Complete*** indicator does not prevent an educator from completing and submitting an application and payment through the recommend, renewal or web application processes.

The display of the *Adverse and Commission Actions Indicator* flag indicates additional information is available on that tab.

Click the *Educator Profile Portal* tab to search for another educator.

Click the *Application* tab to access the *My Filtered Recommends* view.



Educator Profile - *Document* Tab

Document section

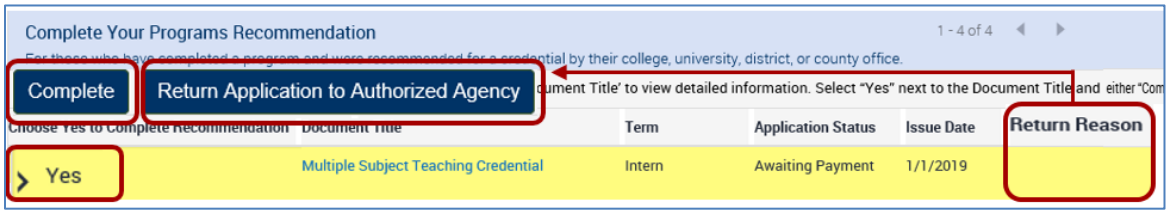
The first section of the *Document* tab displays the documents which have been issued to the educator.

Complete Your Programs Recommendation section

The second section of the *Document* tab is for an educator to complete the online recommendation process. Documents only display here after a recommendation is

made and are available for 90 days.

When '**Yes'** is selected, the educator has the choice to either **complete** or **return** the recommended document. A returned recommendation requires the educator to provide a reason for the return.

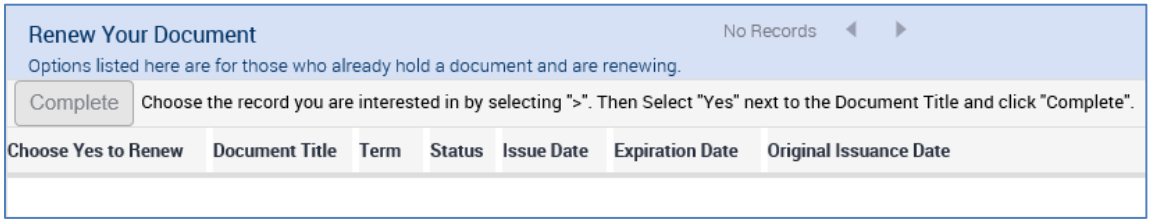


***Renew Your Document* section**

The third section of the *Document* tab displays documents which are eligible for online renewal. The educator uses this section to complete the renewal application.

When '**Yes'** is selected, the educator can **complete** the application. More than one document can be selected.

If a document is not displaying under this section and you believe it should, please view the information under '*My document is not displaying under the renewal section*' on the CTC Online – Written Instructions for Application and Payment webpage.

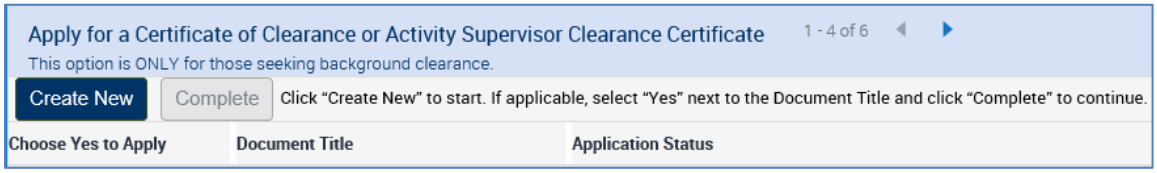


***Apply for a Certificate of Clearance or Activity Supervisor Clearance Certificate* section**

The fourth section of the *Document* tab is where the educator completes an online COC or ASCC application. This section cannot be used to submit an online application for another type of document. The fees are earned upon receipt and are not transferrable.

Applications displayed in this section have not been submitted to the Commission.

When '**Yes'** is selected, the educator can **complete** the application.

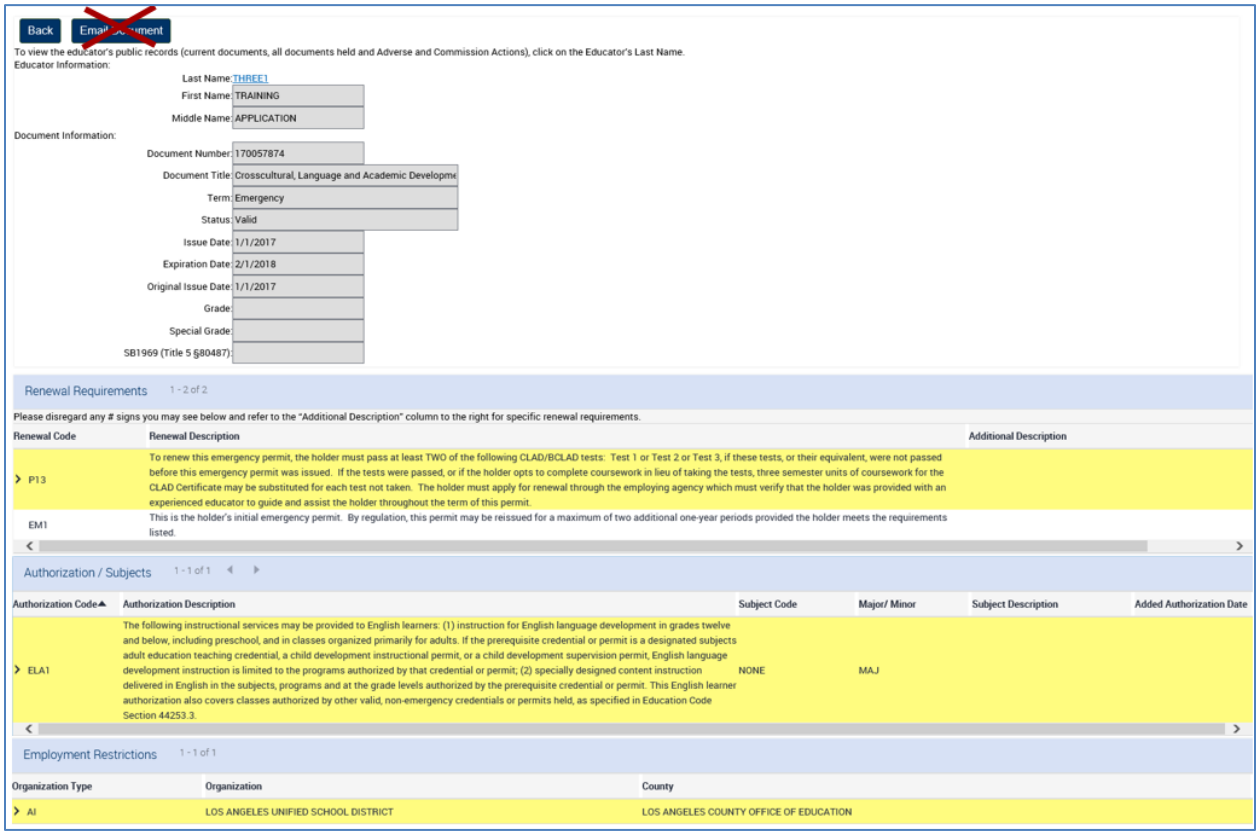


Educator Profile - *Document Details* View

The following view will display when the *Document Number* is clicked. The basic information about the educator's document display on the top half and the document's details display on the bottom half.

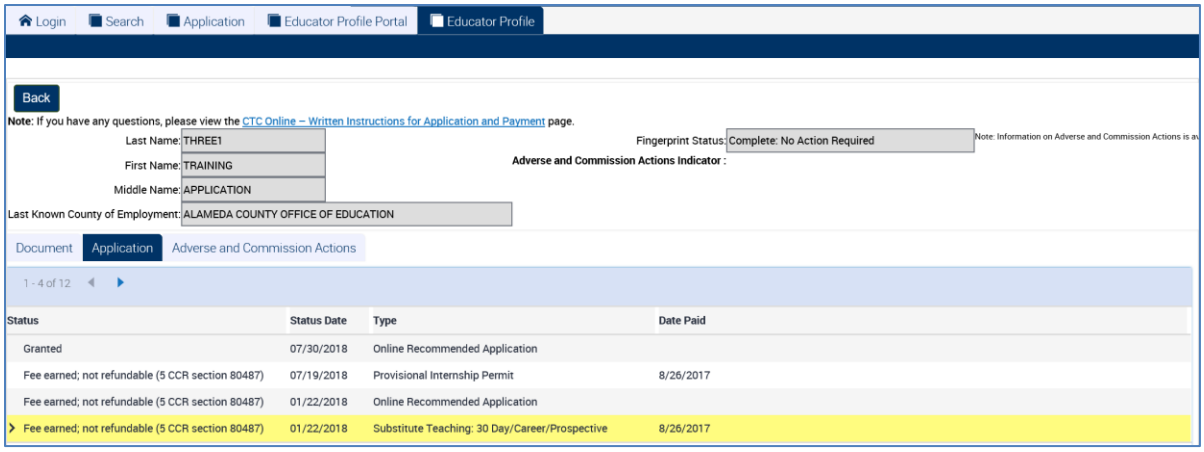
Click on a column heading to sort the information.

The ***Email Document*** button will send a pdf document to the educator's email address on file with the Commission.



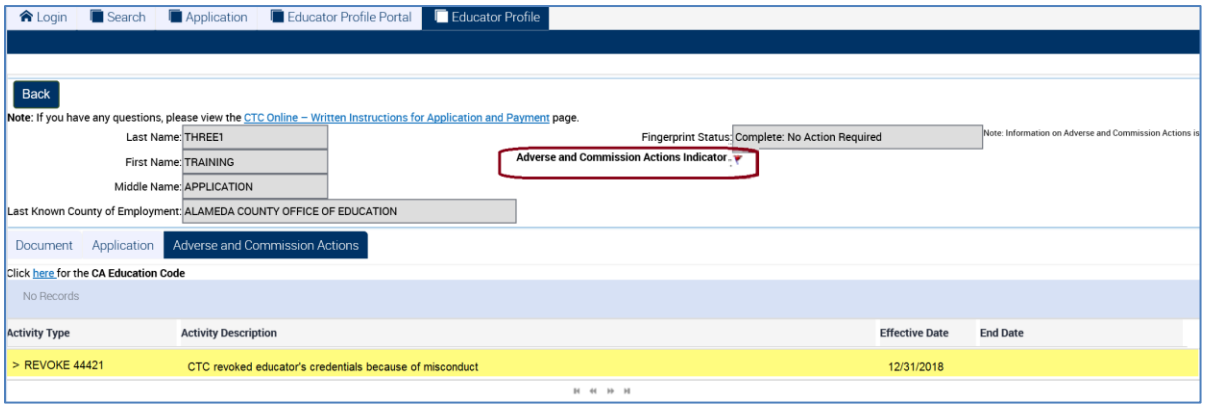
Educator Profile - *Application* tab

The *Application* tab displays the status of all applications the Commission has received for the educator, even ones which were not granted. This is the only tab where pending applications are displayed.



Educator Profile - *Adverse and Commissions Actions* tab

Adverse and Commissions Actions tab displays actions taken by the Commission and the Committee on Credentials. An adverse action is a denial, a private admonition, a public reproval, suspension or revocation of one or more credentials. Adverse actions imposed by the Commission are public and displayed online. If you have questions about information displayed on this view, contact the Division of Licensure Enforcement through: [Contact Us | Commission on Teacher Credentialing]



Closing the *Educator Profile* tab

The *Educator Profile* tab will close when the Authorized Submitter logs out.

Click the ***Person*** icon and then ***Logout*** to securely exit the online system.



Glossary of Terms

-A-

Add an Authorization: this button is used when adding an authorization to an existing issued document based on an approved program or authorization.

Added Authorization Date: the date the educator completed the program requirements for the added authorization.

Adverse and Commission Actions tab: displays public information on adverse action(s) imposed by the Commission onto an educator.

Adverse Action: an adverse action is a denial, a private admonition, a public reproval, suspension or revocation of one or more credentials. Adverse actions imposed by the Commission are public and displayed online.

Adverse Action Indicator: a (red) flag indicates that an educator has an Adverse Action; available in the Document History view of an educator's record. Additional information is viewable by clicking on the Commission and Adverse Action tab.

Agency User: an Authorized Designee and/or Authorized Submitter who can recommend document(s) on behalf of an authorized institution or agency.

Agency User Login Page: a secured page where an authorized user enters the educator's User ID and Password to view the educator's Home Page.

Agency User Home Page: a secured page displaying the Search and Application tabs.

Application tab: displays the "*My Recommends*", "*My Filtered Recommends*", "*Organization's Recommends*" views and is where an authorized submitter starts a new recommend for an educator.

Application to be deleted and purged: the status of a document when it has been deleted or canceled by the authorized submitter prior to the educator completing the application and submitting it to the Commission

Appointing Authority (AA): the person responsible for appointing one or more authorized designees for an organization. This could be a Dean for an Authorized Institution, or a Superintendent for a School District or County Office of Education not operating a Commission-approved program.

Approved Institutions: an organization that has been approved by the Commission through the accreditation system to operate one or more preparation programs.

Approved Institutions link: the link used to create documents earned as the result of the educator completing an organization's commission-approved preparation or subject matter program.

Approved Program: an institution approved as a program sponsor through the

Commission's accreditation system.

Attachment Name: the name used to identify a file that is electronically attached by the Authorized Submitter during the submission process.

Attachments: a feature that allows submission of materials electronically. Attachments are supporting materials that the Commission requires to process a recommendation and subsequent application. Files must have an extension of .jpg, .pdf, .doc or.docx. Each file must be less than 2 MB in size. No more than five attachments.

Authorization Code: a code used to identify each authorization that may be listed on a document.

Authorization Description: describes the authority of an individual to serve in a particular subject or subject area(s), and in a setting and at a grade level listed on the document. The authorization statement provides the specifics for the authorization listed on a document.

Authorizations/Subjects: all authorizations to be displayed on the document must be individually entered. The authorization(s) listed on a credential, certificate, permit, or waiver describe the authority of an individual to serve in a particular subject or subject area(s), and in a setting and at a grade level also listed on the credential. The authorization statement provides the specifics for the authorization.

Authorized Agency: an organization, such as school districts or county office of education that has not been approved by Commission through the accreditation system.

Authorized Agencies link: the link used to create document(s) such as an Emergency 30- Day Substitute Teaching Permit which do not require completion of a Commission-approved program.

Authorized Designees (AD): the person(s) identified by the Appointing Authority as responsible for identifying authorized users and the areas that they can recommend.

Authorized Institution: An institution or agency that operates an accredited teacher preparation program or induction program, and/or an approved elementary or secondary subject-matter preparation program. Formerly known as program sponsor.

Authorized Submitter (AS): the person(s) responsible for electronically submitting documents based on the educator's specific area assignments. This person can also be the Authorized Designee.

Authorized Users: an Educator, Authorized Designee or Authorized Submitter who uses the online system to recommend a credential or submit an application.

Authentication: process used to validate the identity of an individual. The challenge questions that are presented during the authentication process are questions that the educator develops when initially creating the educator's account. The educator can

edit the challenge questions and answers at any time through their User Profile.

Awaiting Payment: the status of a document that has been submitted by the authorized submitter to the educator and they have saved a partially completed application. The application and payment has not yet been submitted by the educator to the Commission.

-B-

Back: this button returns the authorized user to the previous view. This may also delete and purge an entire document from the online system that appears on the *My Filtered Recommend* view.

Base document: also known as a Prerequisite Document. A prerequisite document is the document that an applicant must hold or qualify for in order to submit an application for a dependent credential. Some specialist and services credentials are dependent in that they require a prerequisite document. The statutes or regulations for each dependent document specify which document(s) may serve as prerequisites.

Basic Skills Requirement (BSR): the basic skills requirement became effective on February 1, 1983. Passage of the California Basic Educational Skills Test (CBEST) has been the only method by which to meet this requirement until the passage of Senate Bill 1209 in 2006, when additional options became available to meet the basic skills requirement. A link to the "***Basic Skills Requirements – Out-of-State***" is located under ***Charts*** at the following webpage address: Out-of-State Basic Skills Exams Chart | Commission

Beginning Date of Service: this field was used to enter the issuance date of an internship credential. This field has been replaced with the Issue Date field.

Browse: this button is used to locate and submit electronic file(s) as an attachment during the submission process.

-C-

Cancel: this button removes the data entered, changed or deleted and displays the data previously entered (if any), and may delete and purge an entire document from the online system that displays on the *My Recommends* view.

Candidate Completion Date: this is the date the educator completed the final requirement that qualifies the educator for the document as determined by the program. The date that the final requirement is met as determined by the approved program for the recommended document. For either District or University Interns, the Candidate Completion Date is the date all of the intern pre-service requirements applicable for the educator and the organization offering the commission-approved program have been met by the candidate. Also referred to as the Program Completion

Date.

Certificate of Clearance: the is a document issued by the Commission to an educator who has completed the Commission's fingerprint and character and identification process, whose moral and professional fitness has been shown to meet the standards as established by law. The Certificate of Clearance provides no authorization, only verification that the holder has completed a professional fitness review. An individual enrolled in a California educator preparation program must obtain a Certificate of Clearance prior to beginning their student teaching or practicum. An educator who has already completed the fingerprint process and has been issued a valid document by the Commission is not required to obtain a Certificate of Clearance.

Certificate of Eligibility: a document issued to individuals who have completed a program for the Preliminary Administrative Services Credential or the Preliminary Level I Education Specialist Credential but are not currently employed. Certificates of Eligibility allow the holder to seek employment in their area of certification.

Charter School (CS): a public school covering grades K-12 which is organized by a group of teachers, community members, parents, or others and sponsored by an existing local public school board or a county board of education.

Clear: the term used to identify a teaching credential with no further academic requirements to be completed by the educator.

Commission and Adverse Action tab: this tab displays Commission and Adverse Actions issued to an educator which is now public information.

County of Employment (COE): the County the educator is employed or resides if not employed.

Create New Document: this button is used when creating a New Type or First Time document or when moving a Certificate of Eligibility or Intern document to a Preliminary.

Credential: means any credential, life diploma, permit, certificate, waiver, or document issued by, or under the jurisdiction of, the Commission which entitles the holder to perform services for which certification qualifications are required. The official record of a credential includes any credential in a paper or electronic format, including, but not limited to, information obtained from the Commission's official website. (5 CCR § 80001). Also referred to as a Document.

-D-

Delete: this button removes the data entered and may delete and purge an entire document from the online system that has not been submitted to the Commission.

Dependent document: this document may only be issued to educators who already

hold another type of document (referred to as the base or prerequisite document). The expiration date cannot exceed the expiration date of the appropriate base or prerequisite document. Administrative Services, Library Services or Reading Specialist Credentials are examples of dependent credentials.

Document: a general term used throughout this manual that has the same definition as Credential (5 CCR § 80001).

Document Detail View: displays the details of a selected document with Authorization/Subjects, Renewal Codes and Restrictions in a single view. There is a button available for the user to print the document.

Document Number: a unique number assigned to documents by the Commission.
Document Search: the process for a user to look up an educator's document using the Document Number. This functionality is intended to verify the validity of the document held by the Educator.

Document Term: the term of a credential is determined by the requirements the applicant has met. Examples are clear, preliminary, professional clear, emergency, and life. It often indicates the valid period of a document.

Document Title: determines the type of document you are recommending (Multiple Subject, Single Subject, Education Specialist, etc.) based on the date entered in the Candidate Completion Date.

-E-

Edit: this button activates fields allowing data to be entered, changed or deleted.

Educator: the new term for an applicant within the CTC Online system.

Educator Login Page: a secured page where an educator enters their User ID and Password to access the Educator Page.

Educator Page: a secured page automatically created when an educator's social security number and date of birth have been entered into the Commission's database and their User ID, Password and Challenge questions and answers have been created. Allows the educator to create, edit and view their personal profile, view fingerprint process status, view documents and applications details along with their status, start/return/save/delete/complete and submit for payment applications initiated from the recommends, renewals, and/or web applications processes, and view any Adverse and Commission Actions.

Educator Profile Portal: This portal provides a **read-only** view of the same information available to the Educator when the educator logs into the CTC Online system with a valid User ID and Password.



Some information displayed using this portal is confidential and not for public use.

Educator Return: the document status when the educator has returned an application to the authorized submitter.

Employing Agency: a California public school district or county office of education authorized to create and submit documents through the CTC Online system.

Employing Agency Code: this field has been removed and is replaced with the Employment Restrictions row.

Employment Restrictions: use this field to identify the employment restriction(s) for a document and replaces the Employing Agency Code field. The educator may provide services for or teach in the employing agency listed in the restriction on the credential document.

English Learner Authorization: an authorization embedded in California teaching preparation programs for multiple, single and education specialist credentials.

Exam: this button is used to identify an authorization that was earned by passage of a Commission-approved subject matter examination.

Examination: California state laws and regulations require individuals pursuing credentials authorizing service in California's public schools to verify proficiency in a number of areas. The required level of proficiency may be verified by passing one or more Commission- approved examinations.

Expiration Date: the last date the document is valid in compliance with dating rules.

Export: the process of pulling data from the system, allowing a user to copy data from a record and utilize it in other software.

-F-

Fee Credit: the Certificate of Clearance fee of $50.00 becomes a credit to be applied towards issuance of an individual's initial teaching or services credential.

Fee Credit Amount: this amount is half of the fee paid for a Certificate of Clearance.

Fee Credit Available: this indicates that a fee credit is available. The fee credit will be applied automatically when the educator completes the payment process for the initial teaching or services document submitted online by an authorized submitter.

Fee Date: the date the application is received by the Commission.

Fingerprint Process Complete Indicator: indicates the Commission has received information from the FBI and DOJ as a result of the educator submitting fingerprint images via the Live Scan process or fingerprint cards. It does not indicate the educator is cleared for placement in the classroom.

First Time: the document category used only for the educator's first credential or permit other than a Certificate of Clearance, an Activities Supervisor Clearance Certificate or a Waiver.

-G-

Granted: Evaluation complete; application granted.

-H-

Hyperlink: whenever data in a field displays in a blue color, click on the hyperlink to display an additional level of detail. These links are designed throughout the system for quick access to additional information. For example, on the “Filtered Recommends” view, click on the credential title to view information associated with that document.

-I-

In Progress: the status of a document that has been saved by the authorized submitter and “Yes” was not the selected in response to the declaration statement that appeared on the *Application Summary* view.

Intern: an educator (credential candidate) enrolled in an intern program.

Intern Program: an intern program allows educators (credential candidates) who have a bachelor’s degree and subject matter competency to be employed in a classroom while completing a credential program. Intern programs may be offered by Multiple Subject, Single Subject, Education Specialist, Administrative Services Level I, and School Psychology programs.

Issue Date: the date the document is initially valid. This date is based upon either the completion date of program as determined by the program or the fee date which is the day the Commission receives the application. The Commission will honor the completion date of the program as the issuance date if the applicant is eligible for the document on the date indicated and the application was submitted within the established deadline.

-L-

Level I: the document term for the first tier of a two-tier structure of completing credential requirements used for the Education Specialist Instruction Teaching Credentials. This document requires the educator to complete specific requirements.

Level II: the document term for the final tier of a two-tier structure of completing credential requirements used for the Education Specialist Instruction Teaching Credentials. No further academic requirements are to be completed by the educator.

Live Scan: a process by which an individual's fingerprints are electronically scanned,

the fingerprint information digitized, and the fingerprint images printed on a transmission that is electronically submitted to the Department of Justice.

-M-

My Filtered Recommends: the view displaying active hyperlinks to documents created by an authorized submitter with the following status: In Progress; Ready for Submission Recommended; Educator Return; Awaiting Payment. This view also allows for selecting all, or manually selecting one or more documents, saving, deleting and submitting documents, performing queries and exporting a list.

My Recommends: the view displaying a list of all documents created by an authorized submitter

-N-

New button: this button opens the fields to enter information.

New Type: the document category used for a new document (other than an Upgrade recommendation) when the educator holds any credential or permit (other than a Certificate of Clearance, an Activities Supervisor Clearance Certificate or a Waiver regardless of the expiration dates of the issued documents).

Next: this button advances to the next view.

Non-Public School (NPS): a non-public, nonsectarian school or agency is a private school licensed by the California Department of Education that receives public funding.

Non Sectarian School or Agency (NPA): a non-public, nonsectarian school or agency is a private school licensed by the California Department of Education that receives public funding.

-O-

Online Direct Application Process: now known as Web Applications, the process for an applicant to submit an electronic application directly to the Commission. These documents do not require a recommendation from an approved institution or authorized agency.

Organization's Recommends: the view displaying a list of all documents created by all authorized submitters linked to the same organization as the authorized designee.

Original Issue Date: the date the document was initially issued by the Commission.

-P-

Pending Evaluation: The application has been received by the Commission and is in queue to be evaluated by a Certification Analyst. Note that an application will remain at the "Pending Evaluation" status for the majority of the time until processing is complete.

Pending Additional Evaluation: The application has been reviewed by a Certification Analyst and all academic requirements have been met. Processing will be complete once the Commission completes the professional fitness review. Questions regarding the professional fitness review process should be directed to the Division of Licensure Enforcement through: Contact Us | Commission on Teacher Credentialing

Preliminary: the term used to identify a document that requires the educator to complete specific requirements.

Program Completion Date: the date the final requirement is met as determined by the approved program for the recommended document. For either District or University Interns, the Candidate Completion Date is the date all of the intern pre-service requirements applicable for the educator and the organization offering the commission-approved program have been met by the candidate. Also referred to as the Candidate Completion Date.

Program Name: Refers to a planned sequence of courses and or experiences for the purpose of preparing teachers and other school professionals to work in prekindergarten through twelfth grade settings, and which leads to a credential.

Program Type: the type of commission-approved preparation or subject matter program.

Public Search: formerly Private Look-up; provides the general public with the ability to view public information on educators, Commission issued documents and/or associated Commission and Adverse Actions without the need for a User ID or Password.

-Q-

Query: An electronic method of pulling specific information displayed on the Authorized Designee or Authorized Submitter recommendation/organization views.

-R-

Ready for Submission: the status of a document that has been saved by the authorized submitter and "Yes" was the selected in response to the declaration statement that appeared on the *Application Summary* view.

Recommended: the status of a document that has been submitted by the authorized submitter and "Yes" was the selected in response to the declaration statement that

appeared on the *Application Summary* view.

Recommending Authority: An Authorized Agency or an Authorized Institution who has been approved by the Commission to submit documents through the CTC Online System.

Reissuance: the document category used when the educator's expired preliminary credential is recommended for an upgrade to a clear credential. RI is also when there is a lapse in time between the expiration date of the document to be reissued and the issuance date of the new document.

Renewal: the document category used when the educator's unexpired preliminary credential is recommended for an upgrade to a clear credential. RN is also appropriate when there is no lapse in time between the expiration date of the document to be renewed and the issuance date of the new document.

Returned for Additional Information: The application has been reviewed by a Certification Analyst and it was determined that additional information is needed in order to qualify for the document requested.

-S-

Save: this button must be selected whenever data is entered, changed or deleted.

School District (SD): the School District the educator is employed.

Search tab: displays the same three Search functions available from the Commission public website**.** An authorized user does not need to log out of the online system to access this tab.

Secured Search: provides employers and educators with the ability to view pending application(s) types and status, credentials and associated adverse actions without the need for a user ID or password by entering an educator's social security number (SSN) and date of birth (DOB). Formerly Private Look-Up.

SM at different IHE: identifies subject matter was earned at an IHE or Agency with a commission-approved subject matter program other than the IHE or Agency submitting the document.

SM at the recommending IHE: identifies subject matter was earned at the IHE or Agency with a commission-approved subject matter program submitting the document.

SM by Examination: identifies subject matter was earned by passing the appropriate subject-matter examination(s) in lieu of completing course work in a subject matter preparation program.

Subject Matter Competency: a requirement in statute that each applicant for a teaching credential demonstrates subject-matter competence by either completing a

program of subject-matter study that meets standards of program quality adopted by the Commission or passing an examination of subject-matter understanding adopted by the Commission.

Subject Matter Program: this button is used to identify an authorization that was earned by completion of a Commission-approved subject matter program.

Subject Matter Qualification Route: identifies the route subject matter was earned for the document.

Submission Deadline: effective January 1, 2008, Title 5 Regulation §804440 (b) and (c) establish that the application must be received by the Commission within three months after the requested issuance date of the credential. If the application is received after the three- month time limit, the date of issuance for the credential will become the fee date, which is the date the application was received by the Commission.

Supplement: this button is used to identify supplementary authorization or subject matter authorizations earned by completion of required units and content area coursework that was earned by completion of an approved coursework. These are not Commission- approved coursework.

Supplementary Authorization: requires the credentialed teacher to have either a degree major a specific number of units in the subject or a subject directly related to the subject to be listed on the credential.

Suspend/Revoke History Tab: displays applicable suspension or revocation history of a document within the *Document Detail* view.

-U-

Upgrade a Document: this button is used when an educator completed their renewal requirements and is recommended or renews their document, moving from a Preliminary/Level I/Tier I document to a Clear/Level II/Tier II document.

-W-

Web Applications: an individual who meets credential requirements may submit a web application for a document to the CTC without the formal recommendation of an IHE, LEA, or other agency. Formerly known as the Online Direct Application Process.